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TABLE 3
Soft Drink Industry Regular and Diet Packaged Sales Mix
1963, 1967, 1970-1985

Year	Regular Packaged Mil 12 oz. equivalent units	Regular Packaged % Packaged Sales	Dietetic Packaged Mil 12 oz. equivalent units	Dietetic Packaged % Packaged Sales	Mil 12 oz equivalent units	Sales	
1985	66,871	76.2%	20,272	23.1%	614	0.7%	87,757
1984	65,4		17,777	21.2	670	0.8	83,852
1983	62,[illegible]	80.3	14,891	19.0	548	0.7	78,373
1982	62,0	82.3	13,351	17.7	[illegible]	[illegible]	75,429
1981	62,684	[illegible]	[illegible]	15.0			73,764
1980	61,271		809	13			71,080
1979	59,[illegible]79	86.6	157	13			6[illegible]336
1978	58,[illegible]	88.3	[illegible]	12.0			[illegible],752
1977	54,119		[illegible]380	[illegible]			[illegible],499
1976	50,136	89.0	[illegible]	[illegible]			56,[illegible]
1975	44,715	90.0	[illegible]	[illegible]			
1974	43,686	91.0	[illegible]	[illegible]			
1973	43,932	91.0	[illegible]	[illegible]			
1972	41,509	91.0	[illegible]	[illegible]			
1971	40,420	93.0	2,834	[illegible]			
1970	37,645	93.0	[illegible]	[illegible]			

[1]Prior to 1983, figures in the Other Packaged category were included in [illegible] Regular and Dietetic Packaged categories.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink [illegible]dustry

TABLE 4
Regular Packaged Flavor Mix
1980-1985

Flavor	1980	1981	1982	1983	1984	1985
Cola	54.8%	63.0%	59.6%	59.2%	63.2%	66.4%
Lemon Lime	11.3	10.4	11.2	12.0	12.8	11.3
Orange	4.7	4.9	5.1	4.7	3.5	3.8
Ginger-Ale	4.9	1.6	1.5	1.4	1.5	1.8
Grape	1.3	1.2	1.7	0.9	1.0	0.8
Root Beer	4.0	3.0	2.8	2.0	2.2	2.4
Other	19.0	15.9	18.1	19.8	15.8	13.5
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, 1980-1985.

TABLE 5
Diet Packaged Flavor Mix
1980-1985

Flavor	1980	1981	1982	1983	1984	1985
Cola	55.2%	65.3%	63.3%	57.1%	59.9%	57.6%
Decaffeinated Cola	N/C	N/C	N/C	15.7	19.9	16.4
Lemon Lime	17.5	13.3	14.0	12.0	13.2	12.1
Orange	N/C	N/C	N/C	2.1	1.9	1.3
Ginger Ale	N/C	N/C	N/C	0.5	0.9	0.9
Grape	[illegible]	[illegible]	N/C	0.0	0.0	0.0
[illegible]	[illegible]	[illegible]	[illegible]/C	1.6	1.4	1.7
[illegible]	[illegible]	[illegible]	N/C	6.3	1.9	2.6
[illegible]	[illegible]	[illegible]	[illegible]/C	1.6	0.5	0.9

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Foreword

This *1986 Statistical Profile* provides the latest comprehensive compilation of soft drink industry statistics. It includes the most up-to-date and accurate information available from government agencies, soft drink industry sources and trade press publications. NSDA wishes to thank those who gave permission to reprint.

The major criterion in determining the data to be utilized in the *Statistical Profile* is the data's relevance to soft drink manufacturers as well as to consultants, market researchers and others interested in the industry. The data presented include national consumption trends, state and regional sales, packaging, productivity, price and financial information.

Data presented in this report may not correspond exactly to other available information about trends and patterns of the soft drink industry. In fact, even in this report data derived from different sources may not agree even though the estimates may be, or appear to be, for the same statistic. Such differences may occur because of definitional variance or sampling distortion. The objective of the *Statistical Profile* is to present as comprehensive a reference document as possible. No attempt has been made to evaluate the relative accuracy of conflicting data.

Compiling the data presented here, obtaining permission to reproduce as necessary, entering the data in the computer and arranging the printing has been a significant task carried out efficiently by Ken Fried, Jennifer Lee, and Tera Grey, all of the NSDA Economics and Finance staff.

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Section I

Soft Drink Industry National Consumption Patterns

As reprinted in the annual NSDA Sales Survey, the consumption of soft drinks in the United States has grown steadily over the last fifteen years at an annual compound rate slightly over 5.8%. Total sales increased from 49.5 billion equivalent 12-ounce units in 1970 to 116.1 billion units in 1985, representing a 136% increase. Growth was faster during the earlier decade, 6.3% annually from 1970 to 1980 compared to 5.6% per year for the past five years. The packaged portion of total soft drink consumption has been slowly decreasing as a percentage of sales over the last decade and currently comprises 75.6% of sales. Bulk sales, mainly for fountain use, either pre-mix or post-mix, comprise the remaining 24.4% of total 1985 sales. This segment of the soft drink market has been increasing over the last fifteen years at a compound annual rate of 7.9%. However, this growth seems to have slowed over the last five years as the increase in bulk since 1980 has been at a 6.7% annual compound rate.

Per capita consumption has also been rising at a slower rate over the past few years. It grew 5.3% over the past 10 years and 3.8% over the past 5 years. In 1975, daily per capita soft drink consumption was 9.6 ounces, compared with 13.3 ounces in 1980 and 16.0 ounces in 1985. The national per capita wholesale value in 1985 was $97.46, representing a 17.7% compound annual increase since 1982.

Regular packaged soft drinks have been steadily losing market share to diet beverages over the last decade. According to the NSDA's Sales Survey, in 1985, regular soft drinks accounted for 76.2% of the total packaged sales, with diet beverages representing the other 23.1%. This compares with 90.0% and 10.0% in 1975.

Cola is the predominant flavor representing 66.4% of the packaged market (1985) and 68.9% of the bulk market. The flavor mix of regular packaged soft drinks has shifted slightly over recent years with cola beverages experiencing the greatest percentage point increase and ginger ale the greatest percentage point decrease. During 1980, cola beverages represented 54.8% of regular packaged sales. By 1985, cola represented 62.7% of the regular packaged market. Conversely, during 1980, ginger ale beverages represented 4.9% of regular packaged sales. By 1985, ginger ale sales represented only 1.8% of the regular packaged market.

The flavor mix of diet packaged soft drinks has also shifted slightly over recent years. In the diet segment, however, cola beverages have experienced a percentage point market share decrease from 65.3% in 1981 to 57.6% in 1985.

The container mix used by the soft drink industry is reported annually in the NSDA Sales Survey. This mix represents the percent of soft drink packaged volume going to market in each type of container. According to NSDA's Sales Surveys, the amount packaged in plastic beverage bottles has grown considerably over the last seven years since their introduction in 1978, from 8% to over 26% of the packaged market. Glass bottles, both refillable and non-refillable, have lost market share. The 16-ounce bottle is the dominant glass container within both the refillable bottle and non-refillable bottle categories, however, the 3-liter and larger plastic containers are the fastest growing packages. Cans experienced some market share declines during the early 1980's but have recently experienced share increases.

Various demographic data on beverage consumption appear in this section. Most are from the *Impact Beverage Trends in America Review and Forecast*, courtesy of M. Shanken Communications, Inc. During 1984, 75.8% of all beverages consumed were consumed in a home environment and 24.2% were consumed in some establishment other than a home. On a comparative basis, fruit drinks were most frequently consumed in the home environment as people drank them at home 86.3% of the time and away from home only 13.7% of the time. In contrast, soft drinks were often ingested both in the home and away from the home. During 1984, 66.6% of soft drinks were consumed in the home and 33.4% were outside the home.

When are beverages consumed? Although drunk slightly less during the breakfast/morning hours, soft drinks are enjoyed throughout the day. This is in contrast to coffee which is drunk more during the breakfast/morning hours, and alcoholic beverages which are consumed more during the dinner and evening hours.

Disaggregating consumption patterns by sex shows that females consume a slightly higher percentage of tea, bottled water, and wine than men. Males, however, drink more total beverages, coffee, soft drinks, milk, fruit drinks, distilled spirits and substantially more malt beverages (male 80.3% vs female 19.7%).

Non-alcoholic beverage consumption varies somewhat by household income. In general, households with higher incomes are more likely to consume non-alcoholic beverages than households with lower incomes. This is especially true for the consumption of diet soft drinks, frozen orange juice, tomato and vegetable juices, ground coffee, some types of tea and bottled waters.

TABLE 1
Soft Drink Industry Packaged and Bulk Sales
1965-1985

Year	Total Sales (Mil 12 oz. units)	Packaged Sales (Mil 12 oz. units)	Percent Packaged (%)	Bulk Sales (Mil 12 oz. units)	Percent Bulk (%)	Total Wholesale[1] Value (Mil $)
1985	116,081	87,757	75.6%	28,324	24.4%	$23,269
1984	110,769	83,852	75.7	26,917	24.3	21,488
1983	102,583	78,373	76.4	24,210	23.6	19,444
1982	97,580	75,429	77.3	22,151	22.7	21,156
1981	95,033	73,746	77.6	21,287	22.4	20,015
1980	91,598	71,080	77.6	20,518	22.4	17,677
1979	87,948	68,336	77.7	19,612	22.3	14,973
1978	83,760	65,752	78.5	18,008	21.5	13,345
1977	77,945	61,499	78.9	16,446	21.1	11,527
1976	70,859	56,333	79.5	14,526	20.5	10,375
1975	62,652	49,683	79.3	12,969	20.7	9,398
1974	60,768	48,007	79.0	12,761	21.0	7,827
1973	60,346	48,277	80.0	12,069	20.0	6,223
1972	56,663	45,614	80.5	11,049	19.5	5,684
1971	53,657	43,462	81.0	10,195	19.0	5,347
1970	49,549	40,479	81.7	9,067	18.3	4,800
1969	46,610	38,546	82.7	8,064	17.3	4,370
1968	44,433	37,546	84.5	6,887	15.5	4,166
1967	39,520	32,683	82.7	6,837	17.3	3,459
1966	37,641	32,371	86.0	5,270	14.0	3,176
1965	33,669	29,326	87.1	4,343	12.9	2,736

[1]Beginning in 1983 sales value was explicitly requested as "net of volume discounts and price off." The result was a definitional revision to the 1983 data. The dollar figure shown in the 1983 survey was $20,562,545,000. As this represented 7.1% growth from 1982, 1982 would have been $19,201,919,270. In 1985 another revision was made to the 1983 data resulting from a restatement of the 1983 figure. The new 1983 total sales figure is $19,444,564,000 as shown in the table above.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, 1965-1985.

TABLE 2
Soft Drink Industry Per Capita Consumption
1970-1985

Year	Total Sales (Thous. 12 oz. units)	Packaged %	Bulk %	Population[2] (Thous.)	Dollars[1] (Mil.)	PER CAPITA Total 12 oz. Units	PER CAPITA Packaged 12 oz. Units	PER CAPITA Bulk 12 oz. Units	Total Value Dollars
1985	116,081,520	75.6%	24.4%	238,740	$23,268.8	486.2	367.6	118.6	$97.46
1984	110,769,120	75.7	24.3	236,158	21,488.2	469.0	335.0	114.0	90.99
1983	102,582,576	76.4	23.6	234,023	19,444.6	438.3	334.9	103.4	83.09
1982	97,579,560	77.3	22.7	231,822	21,156.1	420.9	325.4	95.5	91.25
1981	95,032,728	77.6	22.4	229,542	20,015.3	414.0	321.3	92.7	87.20
1980	91,597,800	77.6	22.4	227,236	19,676.6	403.1	312.8	90.3	86.59
1979	87,948,000	77.7	22.3	224,567	14,972.6	391.6	304.3	87.3	66.67
1978	83,760,000	78.0	22.0	222,095	13,344.6	377.1	294.2	82.9	60.09
1977	77,945,328	78.5	21.5	219,760	11,526.8	354.7	278.4	76.3	52.45
1976	70,859,393	79.0	21.0	217,563	10,375.2	325.7	257.3	68.4	47.69
1975	62,651,983	79.0	21.0	215,465	9,397.8	290.8	229.7	61.1	43.62
1974	60,768,175	79.0	21.0	213,342	7,827.1	284.8	225.0	59.6	36.69
1973	60,345,761	80.0	20.0	211,357	6,223.2	285.5	228.4	57.1	29.44
1972	56,662,673	80.5	19.5	209,284	5,683.8	270.7	217.9	52.8	27.16
1971	53,657,839	81.0	19.0	206,827	5,347.0	259.4	210.1	49.3	25.85
1970	49,546,159	81.4	18.6	203,984	4,799.8	242.9	197.7	45.2	23.53

[1]1983-1984 Dollar figures are shown "net of volume discounts and price-off." The corresponding figure for 1982 is estimated to have been $19,201.9 million.
[2]Population as of July 1st for each year.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, 1970-1985.

TABLE 3
Soft Drink Industry Regular and Diet Packaged Sales Mix
1963, 1967, 1970-1985

Year	Regular Packaged Mil 12 oz. equivalent units	Regular Packaged % Packaged Sales	Dietetic Packaged Mil 12 oz. equivalent units	Dietetic Packaged % Packaged Sales	Other Mil 12 oz. equivalent units	Other % Packaged Sales	Total Packaged Mil 12 oz. equivalent units
1985	66,871	76.2%	20,272	23.1%	614	0.7%	87,757
1984	65,405	78.0	17,777	21.2	670	0.8	83,852
1983	62,934	80.3	14,891	19.0	548	0.7	78,373
1982	62,078	82.3	13,351	17.7	[1]	[1]	75,429
1981	62,684	85.0	11,062	15.0			73,764
1980	61,271	86.2	9,809	13.8			71,080
1979	59,179	86.6	9,157	13.4			68,336
1978	58,059	88.3	7,693	11.7			65,752
1977	54,119	88.0	7,380	12.0			61,499
1976	50,136	89.0	6,197	11.0			56,333
1975	44,715	90.0	4,968	10.0			49,683
1974	43,686	91.0	4,321	9.0			48,007
1973	43,932	91.0	4,345	9.0			48,277
1972	41,509	91.0	4,105	9.0			45,614
1971	40,420	93.0	3,042	7.0			43,462
1970	37,645	93.0	2,834	7.0			40,479

[1]Prior to 1983, figures in the Other Packaged category were included in the Regular and Dietetic Packaged categories.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, 1970-1985.

TABLE 4
Regular Packaged Flavor Mix
1980-1985

Flavor	1980	1981	1982	1983	1984	1985
Cola	54.8%	63.0%	59.6%	59.2%	63.2%	66.4%
Lemon Lime	11.3	10.4	11.2	12.0	12.8	11.3
Orange	4.7	4.9	5.1	4.7	3.5	3.8
Ginger-Ale	4.9	1.6	1.5	1.4	1.5	1.8
Grape	1.3	1.2	1.7	0.9	1.0	0.8
Root Beer	4.0	3.0	2.8	2.0	2.2	2.4
Other	19.0	15.9	18.1	19.8	15.8	13.5
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, 1980-1985.

TABLE 5
Diet Packaged Flavor Mix
1980-1985

Flavor	1980	1981	1982	1983	1984	1985
Cola	55.2%	65.3%	63.3%	57.1%	59.9%	57.6%
Decaffeinated Cola	N/C	N/C	N/C	15.7	19.9	16.4
Lemon Lime	17.5	13.3	14.0	12.0	13.2	12.1
Orange	N/C	N/C	N/C	2.1	1.9	1.3
Ginger Ale	N/C	N/C	N/C	0.5	0.9	0.9
Grape	N/C	N/C	N/C	0.0	0.0	0.0
Root Beer	N/C	N/C	N/C	1.6	1.4	1.7
Pepper Type	N/C	N/C	N/C	6.3	1.9	2.6
Decaffeinated Pepper Type	N/C	N/C	N/C	1.6	0.5	0.9
Non-Carbonated	N/C	N/C	N/C	0.0	0.0	0.4
Other	27.3	21.4	22.7	3.1	1.4	6.1
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: N/C = not collected.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, 1980-1985.

TABLE 6
Soft Drink Industry Packaging Mix Packaged Volume
1965-1985

Year	Percentage Cans	Percentage NR Bottles	Percentage of NR Bottles (6-12 oz.)	16 oz. ½ liter	24 oz. 1 liter	48 oz. 2 liter	Percentage Refillable Bottles	Percentage of Refillable Bottles (6-9 oz.)	(10-12 oz.)	16 oz.	24 1 liter	(48-64 oz.)
1985	42.5%	14.3%	14.0%	80.5%	5.5%[2]	—	16.3%	9.2%[2]	—	81.7%	9.1%[2]	—
1984	40.5	15.1	15.3	79.3	5.4[2]	—	20.1	12.2[2]		69.5	18.1[2]	—
1983	37.7	14.4	19.0	71.2	9.8[2]	—	23.3	1.5	8.8%	73.9	16.0[2]	—
1982	36.5	15.7	29.9	55.2	5.3	9.5%	26.4	2.5	13.5	64.4	19.7[2]	—
1981	36	15	30	57	6	7	29	3	17	59	20	1.0%
1980	37	14	22	39	27	12	31	1	17	53	26	1
1979	42	9	27	33	18	22	34	4	19	52	24	1
1978	43	11[1]	34	18	21	27	36	4	23	46	27	—
1977	38	22	29	19	18	34	40	4	23	47	25	1
1976	34.5	21.5	31	16	21	30	44	7	28	39	(26)	
1975	32	22	36	20	28	17	47	8	31	39	(23)	
1974	29	18	35	19	35	11	53	8	32	38	(23)	
1973	29	17	36	22	(42)		54	10	35	39	(16)	
1972	25	18	38	20	(42)		57	13	40	35	(10)	
1971	21	20	35	25	(40)		59	N/C	N/C	N/C	N/C	N/C
1970	19	20	40	25	(35)		61	N/C	N/C	N/C	N/C	N/C
1969	20	13	N/C	N/C	N/C	N/C	67	N/C	N/C	N/C	N/C	N/C
1968	21	9	N/C	N/C	N/C	N/C	70	N/C	N/C	N/C	N/C	N/C
1967	14	7	N/C	N/C	N/C	N/C	79	N/C	N/C	N/C	N/C	N/C
1966	10	3	N/C	N/C	N/C	N/C	87	N/C	N/C	N/C	N/C	N/C
1965	9	2	N/C	N/C	N/C	N/C	89	N/C	N/C	N/C	N/C	N/C

[1]Containers were combined to include all containers 24 oz. and larger.
[2]Containers were combined to include all containers 6-12 oz.
NOTE: N/C = Information not collected.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, [years 1965-1985].

TABLE 6 Continued
Soft Drink Industry Packaging Mix Packaged Volume
1965-1985

Year	Percentage Plastics[1]	Percentage of Plastics ½ liter	1 liter	2 liter	3 liter and larger	Aseptics
1985	26.3%	3.9%	3.6%	80.5%	12.0%	0.1%
1984	24.2	2.4	3.3	93.3	1.0	0.1
1983	24.6	N/C	N/C	N/C	N/C	N/C
1982	21.4	N/C	N/C	N/C	N/C	N/C
1981	20	N/C	N/C	N/C	N/C	N/C
1980	18	N/C	N/C	N/C	N/C	N/C
1979	15	N/C	N/C	N/C	N/C	N/C
1978	8	N/C	N/C	N/C	N/C	N/C
1977		N/C	N/C	N/C	N/C	N/C
1976		N/C	N/C	N/C	N/C	N/C
1975		N/C	N/C	N/C	N/C	N/C
1974		N/C	N/C	N/C	N/C	N/C
1973		N/C	N/C	N/C	N/C	N/C
1972		N/C	N/C	N/C	N/C	N/C
1971		N/C	N/C	N/C	N/C	N/C
1970		N/C	N/C	N/C	N/C	N/C
1969		N/C	N/C	N/C	N/C	N/C
1968		N/C	N/C	N/C	N/C	N/C
1967		N/C	N/C	N/C	N/C	N/C
1966		N/C	N/C	N/C	N/C	N/C
1965		N/C	N/C	N/C	N/C	N/C

[1]Containers were combined to include all containers 24 oz. and larger.
[2]Containers were combined to include all containers 6-12 oz.
NOTE: N/C = Information not collected.
SOURCE: National Soft Drink Association Sales Survey of the Soft Drink Industry, [years 1965-1985].

TABLE 7
1984 National Beverage Consumption by Location of Consumption
(% of volume)

Location	Total (%)	Coffee (%)	Soft Drinks (%)	Milk (%)	Tea (%)	Fruit Juice/ Fruit Drinks (%)	Bottled Water (%)	Other Non-Alcoholic Beverages (%)	Wine (%)	Distilled Spirits (%)	Malt Beverages (%)
Total Home	75.8%	72.3%	66.6%	86.3%	83.5%	86.3%	72.7%	67.4%	77.6%	64.1%	67.0%
In Own Home	71.0	68.6	61.0	83.3	79.0	82.6	68.6	64.9	64.5	54.1	54.8
Another Person's Home	4.8	3.7	5.6	3.0	4.5	3.7	4.1	2.5	13.1	10.0	12.2
Total Away From Home	24.2%	27.7%	33.4%	13.7%	16.5%	13.7%	27.3%	32.6%	22.4%	35.9%	33.0%
Fast Food Restaurants	2.2	1.3	5.0	0.4	1.0	0.7	0.6	0.4	0.1	0.1	0.5
Other Restaurants	3.8	6.7	3.3	0.8	4.8	1.1	0.9	2.6	11.8	14.1	4.1
Bar/Private Club	0.9	0.3	0.5	0.1	0.1	0.3	0.1	6.4	3.0	12.2	11.8
Party	0.5	0.2	0.6	*	0.1	0.4	0.2	0.5	3.0	4.3	3.5
Office/Work	10.1	16.2	15.1	2.5	8.2	4.1	21.7	5.5	0.4	0.9	1.9
School	2.5	0.2	1.9	8.8	0.5	3.5	0.2	13.5	*	*	*
Picnic/Camping	0.9	0.5	1.4	0.4	0.3	1.0	0.3	0.4	1.4	0.6	2.8
Sporting Event	0.6	0.1	0.9	0.1	0.1	0.2	2.6	0.6	0.3	1.1	3.4
Other	2.7	2.2	4.7	0.6	1.4	2.4	0.7	2.7	2.4	2.6	5.0

Note: * = Less than 0.05%
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 8
1984 National Beverage Consumption By Time of Day
(% of volume)

Time of Day	Total (%)	Coffee (%)	Soft Drinks (%)	Milk (%)	Tea (%)	Fruit Juice/ Fruit Drinks (%)	Bottled Water (%)	Other Non-Alcoholic Beverages (%)	Wine (%)	Distilled Spirits (%)	Malt Beverages (%)
Breakfast/Morning	30.7%	66.2%	10.3%	26.5%	14.5%	56.5%	22.2%	32.3%	1.6%	2.5%	2.6%
Lunch	19.7	10.0	26.0	26.3	22.5	13.5	11.4	27.8	5.6	4.5	6.7
Snack	11.9	6.8	19.2	5.5	10.9	9.5	20.0	8.8	20.1	30.6	26.8
Dinner	22.3	9.2	23.1	35.1	37.5	11.1	16.5	14.7	42.9	19.3	13.3
Evening	15.4	7.8	21.4	8.6	11.3	9.4	29.9	16.4	29.8	43.1	50.6
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 9
1984 National Beverage Consumption by Gender
(% of volume)

Gender (Population Share)	Total (%)	Coffee (%)	Soft Drinks (%)	Milk (%)	Tea (%)	Fruit Juice/ Fruit Drinks (%)	Bottled Water (%)	Other Non-Alcoholic Beverages (%)	Wine (%)	Distilled Spirits (%)	Malt Beverages (%)
Male (48.6%)	53.4%	51.9%	52.1%	57.1%	47.0%	52.8%	48.5%	52.0%	46.3%	56.6%	80.3%
Female (51.4%)	46.6	48.1	47.9	42.9	53.0	47.2	51.5	48.0	53.7	43.4	19.7
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 10
Percentage of Non-Alcoholic Beverage Drinkers By Household Income—1983

Category	$40,000 & Over	$30,000 & Over	$25,000 & Over	$20,000 $24,000	$15,000 $19,999	$10,000 $14,000	Under $10,000
Soft Drinks							
Regular Cola*	62.5%	64.1%	64.6%	69.7%	65.5%	63.1%	62.0%
Other Regular Carbonated*	55.7	58.0	58.0	57.4	57.2	54.4	51.0
Diet Cola*	40.1	38.9	38.4	35.0	35.7	31.7	28.2
Other Diet Carbonated*	32.9	32.6	32.4	30.0	27.9	29.5	25.1
Powdered**	38.1	42.3	44.2	47.2	44.6	39.0	37.0
Fruit Beverages							
Orange Juice**	43.0%	42.4%	43.9%	42.6%	44.0%	47.7%	45.1%
Frozen Orange Juice**	70.0	71.2	70.2	66.2	67.5	57.5	53.0
Other Fruit Juices**	64.8	64.1	64.1	63.9	60.5	58.9	51.0
Tomato and Vegetable Juices**	60.2	58.0	56.8	48.3	46.8	46.9	45.0
Powdered Fruit Drinks**	15.5	17.4	18.1	16.7	15.6	17.0	21.4
Milk**	87.6%	88.6%	88.7%	89.7%	88.5%	88.3%	86.3%
Coffee							
Ground**	67.6%	67.7%	66.9%	62.5%	61.3%	54.3%	49.0%
Caffeinated Instant and Freeze Dried**	34.2%	33.5%	34.0%	29.9%	33.9%	36.6%	32.1%
Decaffeinated Instant and Freeze Dried**	42.4%	42.8%	41.3%	39.2%	37.7%	38.2%	41.9%
Tea							
Regular**	77.0%	77.2%	77.7%	74.9%	76.4%	72.3%	70.3%
Canned*	12.5	12.3	12.3	12.2	14.6	12.4	14.1
Instant (unsweetened)**	27.4	29.6	27.5	27.9	28.3	28.8	25.1
Instant Iced Tea Mix**	35.3	34.0	34.1	31.7	27.9	28.0	26.3
Herbal**	35.6	34.7	33.7	26.5	28.0	29.4	30.9
Miscellaneous							
Bottled Water*	15.8%	14.3%	13.5%	10.0%	12.1%	7.8%	6.9%

NOTE: * = Total adults
** = Female Homemakers
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 10-A
Percentage of Non-Alcoholic Beverage Drinkers By Household Income—1984

Category	$40,000 & Over	$30,000 & Over	$25,000 & Over	$20,000 $24,999	$15,000 $19,999	$10,000 $14,999	Under $10,000
Soft Drinks							
Regular Cola*	60.0%	62.8%	63.5%	66.7%	65.4%	66.0%	62.4%
Other Regular Carbonated*	55.5	56.1	56.1	56.5	55.0	55.1	49.7
Diet Cola*	49.3	47.2	46.1	38.2	37.9	34.9	28.4
Other Diet Carbonated*	37.3	35.8	35.0	30.2	29.7	29.1	24.0
Powdered**	45.2	46.5	46.9	41.9	44.2	43.4	36.5
Fruit Beverages							
Orange Juice**	49.6%	49.8%	49.2%	47.0%	45.9%	49.9%	47.0%
Frozen Orange Juice**	70.2	70.2	70.3	64.7	65.4	60.3	53.6
Other Fruit Juices**	71.5	69.4	68.4	63.7	60.6	60.7	53.0
Tomato and Vegetable Juices**	64.6	60.5	59.7	54.0	49.2	48.0	45.4
Powdered Fruit Drinks**	15.2	15.6	15.9	17.2	21.5	15.5	17.3
Milk**	92.3%	91.7%	92.0%	90.0%	88.5%	90.4%	85.0%
Coffee							
Ground**	70.1%	69.1%	68.3%	59.0%	55.1%	54.6%	45.2%
Caffeinated Instant and Freeze Dried**	41.9%	38.0%	38.3%	34.7%	36.6%	35.4%	35.4%
Decaffeinated Instant and Freeze Dried**	43.6%	41.9%	41.6%	35.4%	39.8%	38.8%	39.3%
Tea							
Regular**	81.0%	78.7%	78.5%	73.9%	71.9%	76.8%	66.7%
Canned*	11.8	12.0	12.3	12.9	15.1	14.6	16.0
Instant (unsweetened)**	27.4	28.8	29.3	26.0	27.6	26.9	24.7
Instant Iced Tea Mix**	36.1	34.8	34.6	27.5	27.5	27.3	25.5
Herbal**	41.2	38.7	37.8	30.2	26.0	30.7	28.3
Miscellaneous							
Bottled Water*	17.3%	15.5%	14.3%	11.8%	12.5%	8.9%	9.4%

NOTE: * = Total adults
** = Female Homemakers
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

Section II

Soft Drink Industry State and Regional Data

There is little soft drink data available at the individual state level, either on production or consumption. Although soft drink franchises often crossed state lines, in years past production generally offered a good approximation of consumption. Recently, with the introduction of many large centralized, regional production facilities shipping to somewhat distant destination outlets, this correspondence has blurred.

For a number of years, *Beverage World* has offered a state-by-state estimate of sales which essentially meant consumption. These data, which shifted to a regional basis in 1985, are reproduced here with *Beverage World*'s caution that it is not appropriate to make year-to-year comparisons as the companies responding to the query regarding their sales in a particular state varies from year to year.

According to *Beverage World*, at the wholesale level, South Atlantic bottlers led the nation in total dollar soft drink sales at $4,282.1 million in 1985. East North Central bottlers ranked second with sales of $4,137.6 million followed by Middle Atlantic bottlers with a 1985 wholesale dollar volume estimated at $3,949.8 million.

According to the *Beverage Industry 1986 Annual Manual*, there were 1,423 soft drink producing plants in the United States in 1985. That number has decreased continually in recent years. There were 3,054 soft drink plants in 1970, 2,398 plants in 1975, and 1,859 plants in 1980.

Soft drink industry data and statistics derived by U.S. government publications indicate that in 1984 there were at least 1,139 soft drink plants that employed under 100 employees, while at least 334 plants employed 100 or more employees.

TABLE 11
Soft Drink Industry State-by-State Consumption and Revenues—1981

State	Population (Thous.)	Packaged Gallons (Thous.)	Bulk Gallons (Thous.)	Total Gallons (Thous.)	Per Capita Packaged Gallons	Per Capita Bulk Gallons	Per Capita Total Gallons	Wholesale Dollars (Thous. $)	Retail Dollars (Thous. $)
NEW ENGLAND									
Maine	1,125	29,191.1	6,847.3	36,038.4	25.9	6.1	32.0	$19,915.2	$100,589.3
New Hampshire	921	22,756.2	4,660.9	27,417.1	24.7	5.1	29.8	59,039.2	74,607.8
Vermont	512	12,364.7	2,514.6	14,879.3	24.1	4.9	29.1	32,249.4	40,914.8
Massachusetts	5,737	166,400.1	41,600.0	208,000.1	29.0	7.3	36.3	470,590.0	589,978.8
Rhode Island	947	26,162.5	6,337.5	32,500.0	27.6	6.7	34.3	66,969.8	842,294.8
Connecticut	3,108	85,285.6	20,005.3	105,290.9	27.4	6.4	33.9	224,043.3	287,313.1
MIDDLE ATLANTIC									
New York	17,558	504,251.6	134,041.6	638,293.2	28.7	7.6	36.4	$1,584,520.6	$2,016,144.0
New Jersey	7,365	204,776.5	51,194.1	255,970.6	27.8	7.0	34.8	628,897.7	785,304.5
Pennsylvania	11,864	329,256.0	87,523.8	416,779.8	27.8	7.4	35.1	1,015,204.3	1,275,299.7
EAST NORTH CENTRAL									
Ohio	10,798	300,035.7	89,621.0	389,656.7	27.8	8.3	36.1	$894,231.8	$1,134,511.9
Indiana	5,490	142,714.1	43,111.5	185,825.6	26.0	7.9	33.9	422,328.1	534,751.8
Illinois	11,427	322,758.1	99,147.9	421,906.0	28.2	8.7	36.9	998,140.8	1,277,520.3
Michigan	9,262	265,489.4	74,881.6	340,371.0	28.7	8.1	36.8	707,550.5	921,513.8
Wisconsin	4,706	126,169.1	37,686.9	163,856.0	26.8	8.0	34.8	383,689.6	486,786.9
WEST NORTH CENTRAL									
Minnesota	4,076	120,437.6	32,015.1	152,452.7	29.5	7.9	37.4	$238,995.0	$298,241.9
Iowa	2,914	79,584.6	21,155.4	100,740.0	27.3	7.3	34.6	192,702.0	239,509.4
Missouri	4,917	152,652.7	36,978.0	189,630.7	31.0	7.5	38.6	381,458.6	480,141.9
North Dakota	653	15,882.8	3,253.1	19,135.9	24.3	5.0	29.3	37,327.7	46,954.5
South Dakota	691	17,486.9	4,648.4	22,135.3	25.3	6.7	32.0	44,468.1	55,362.7
Nebraska	1,570	44,704.2	11,955.1	56,659.3	28.5	7.6	36.1	115,808.8	143,695.6
Kansas	2,364	68,871.7	18,307.7	87,179.4	29.1	7.7	36.9	177,230.2	221,165.5
SOUTH ATLANTIC									
Delaware	594	18,323.9	4,581.0	22,904.9	30.8	7.7	38.5	$46,795.9	$57,498.1
Maryland	4,217	133,950.1	33,487.5	167,437.6	31.6	7.9	39.7	364,094.9	450,713.1
D.C.	638	22,812.5	5,351.1	28,163.6	35.8	8.4	44.1	61,556.8	77,583.2
Virginia	5,347	170,996.0	44,093.3	215,089.3	32.0	8.2	40.2	472,137.4	589,697.7
West Virginia	1,950	62,255.6	16,549.0	78,804.6	31.9	8.5	40.4	171,559.2	211,652.7
North Carolina	5,882	250,764.6	74,903.7	325,668.3	42.6	12.7	55.4	702,594.1	869,390.0
South Carolina	3,122	120,414.5	40,138.1	160,552.6	38.6	12.9	51.4	348,895.9	432,596.0
Georgia	5,463	202,072.8	50,518.2	252,591.0	37.0	9.2	46.2	541,626.9	671,346.5
Florida	9,746	290,052.7	68,037.0	358,089.7	29.8	7.0	36.7	737,834.7	911,752.7
EAST SOUTH CENTRAL									
Kentucky	3,661	116,906.2	29,226.5	146,132.7	31.9	8.0	39.9	$294,998.5	$367,981.0
Tennessee	4,591	165,779.8	49,518.7	215,298.5	36.1	10.8	46.9	366,010.9	452,609.1
Alabama	3,894	133,767.6	31,377.6	165,145.2	34.4	8.1	42.4	319,618.2	395,495.6
Mississippi	2,521	89,263.4	22,315.9	111,579.3	35.4	8.9	44.3	216,553.0	267,962.7
WEST SOUTH CENTRAL									
Arkansas	2,286	63,953.5	15,988.4	79,941.9	28.0	7.0	35.0	$156,708.1	$195,352.4
Louisiana	4,206	128,626.1	34,191.8	162,817.9	30.6	8.1	38.7	323,178.5	403,132.9
Texas	14,229	418,012.4	139,337.5	557,349.9	29.4	9.8	39.2	1,177,433.9	1,464,374.6
Oklahoma	3,025	84,875.3	23,939.2	108,814.5	28.1	7.9	36.0	218,638.3	276,009.1
MOUNTAIN									
Montana	787	16,125.3	4,548.2	20,673.5	20.5	5.8	26.3	$42,844.2	$54,943.4
Idaho	944	18,576.2	5,548.8	24,125.0	19.7	5.9	25.6	50,407.5	64,390.4
Wyoming	470	8,418.8	2,806.3	11,225.1	17.9	6.0	23.9	23,611.8	30,043.7
Colorado	2,890	72,822.8	24,274.3	97,097.1	25.2	8.4	33.6	207,326.4	263,491.2
New Mexico	1,303	30,570.0	10,190.0	40,760.0	23.5	7.8	31.3	86,107.9	109,245.0
Arizona	2,718	66,657.2	19,910.6	86,567.8	24.5	7.3	31.8	181,281.2	232,475.0
Utah	1,461	34,922.0	11,640.7	46,562.7	23.9	8.0	31.9	98,366.5	123,813.9
Nevada	801	21,525.7	7,367.8	28,893.5	26.9	9.2	36.1	61,890.8	79,214.0
PACIFIC									
Washington	4,132	93,798.2	26,455.9	120,254.1	22.7	6.4	29.1	$247,889.2	$311,819.8
Oregon	2,633	56,572.2	18,357.9	74,930.1	21.5	7.0	28.5	156,060.8	194,748.0
California	23,668	618,437.5	206,145.9	824,583.4	26.1	8.7	34.8	2,034,746.2	2,597,556.9
Alaska	402	9,827.3	3,275.8	13,103.1	24.4	8.1	32.6	30,902.0	41,776.4
Hawaii	965	25,252.7	8,417.5	33,670.2	26.2	8.7	34.9	68,836.2	87,679.3
Total U.S.	226,551	6,583,564.1	1,859,981.0	8,443,545.1	29.1	8.2	37.3	18,505,868.6	24,138,947.4

NOTE: Data does not include non-carbonated fruit flavored drinks marketed or produced by soft drink bottlers.
Bulk gallonage is projected on a finished drink basis.
SOURCE: Beverage World, April 1982

TABLE 11-A
Soft Drink Industry State-by-State Consumption and Revenues—1982

State	Population (Thous.)	Packaged Gallons (Thous.)	Bulk Gallons (Thous.)	Total Gallons (Thous.)	Per Capita Packaged Gallons	Per Capita Bulk Gallons	Per Capita Total Gallons	Wholesale Dollars (Thous. $)	Retail Dollars (Thous. $)
NEW ENGLAND									
Maine	1,133	29,484.9	6,949.9	36,434.8	26.0	6.1	32.2	$20,134.3	$101,695.8
New Hampshire	951	23,165.8	4,744.8	27,910.6	24.4	5.0	29.3	60,101.9	75,950.7
Vermont	516	12,500.7	2,542.3	15,043.0	24.2	4.9	29.2	32,604.1	41,364.9
Massachusetts	5,781	168,230.5	42,057.6	210,288.1	29.1	7.3	36.4	475,766.5	596,468.6
Rhode Island	958	26,476.4	6,413.6	32,890.0	27.6	6.7	34.3	67,773.4	852,402.3
Connecticut	3,153	86,394.3	20,265.4	106,659.7	27.4	6.4	33.8	226,955.9	291,046.2
MIDDLE ATLANTIC									
New York	17,659	510,302.6	135,650.1	645,952.7	28.9	7.7	36.6	$1,603,534.8	$2,040,337.7
New Jersey	7,438	207,029.1	51,757.2	258,786.3	27.8	7.0	34.8	635,815.6	793,942.8
Pennsylvania	11,865	332,548.6	88,399.0	420,947.6	28.0	7.5	35.5	1,025,356.3	1,288,052.7
EAST NORTH CENTRAL									
Ohio	10,791	303,036.1	90,517.2	393,553.3	28.1	8.4	36.5	$903,174.1	$1,145,857.0
Indiana	5,472	143,998.5	43,499.5	187,498.0	26.3	7.9	34.2	426,129.1	539,564.6
Illinois	11,448	325,985.7	100,139.4	426,125.1	28.5	8.7	37.3	1,008,122.2	1,290,295.5
Michigan	9,109	266,551.4	75,181.1	341,732.5	29.3	8.3	37.5	710,380.7	925,199.9
Wisconsin	4,765	127,809.3	38,176.8	165,986.1	26.8	8.0	34.8	388,677.6	493,115.1
WEST NORTH CENTRAL									
Minnesota	4,133	122,003.3	32,431.3	154,434.6	29.5	7.8	37.4	$242,101.9	$302,119.0
Iowa	2,905	80,300.9	21,345.8	101,646.7	27.6	7.3	34.9	194,436.3	241,665.0
Missouri	4,951	154,058.9	37,384.8	191,443.7	31.1	7.6	38.7	385,654.7	485,423.5
North Dakota	670	16,168.6	3,311.7	19,480.3	24.1	4.9	29.1	37,999.6	47,799.7
South Dakota	691	17,679.3	4,699.5	22,378.8	25.6	6.8	32.4	44,957.2	55,971.9
Nebraska	1,586	45,285.4	12,110.5	57,395.9	28.6	7.6	36.2	117,341.3	145,563.6
Kansas	2,408	69,904.8	18,582.3	88,487.1	29.0	7.7	36.7	179,888.7	224,483.0
SOUTH ATLANTIC									
Delaware	602	18,580.5	4,645.1	23,225.6	30.9	7.7	38.6	$47,451.0	$58,303.1
Maryland	4,265	135,423.5	33,855.9	169,279.4	31.8	7.9	39.7	368,099.9	455,670.9
D.C.	631	23,017.8	5,399.3	28,417.1	36.5	8.6	45.0	62,110.8	78,281.4
Virginia	5,491	173,731.9	44,798.8	218,530.7	31.6	8.2	39.8	479,691.6	599,132.9
West Virginia	1,948	62,940.4	16,731.0	79,671.4	32.3	8.6	40.8	173,446.4	213,980.9
North Carolina	6,019	254,776.8	76,102.2	330,879.0	42.3	12.6	55.0	713,835.6	883,300.2
South Carolina	3,203	122,220.7	40,740.2	162,960.9	38.2	12.7	50.9	354,129.3	439,084.9
Georgia	5,639	205,508.0	51,350.0	256,858.0	36.4	9.1	45.6	550,834.6	682,759.4
Florida	10,416	297,014.0	69,669.9	366,683.9	28.5	6.7	35.2	755,542.7	933,634.8
EAST SOUTH CENTRAL									
Kentucky	3,667	118,426.0	29,606.4	148,032.4	32.3	8.1	40.4	$298,833.5	$372,764.8
Tennessee	4,651	167,934.9	50,162.5	218,097.4	36.1	10.8	46.9	370,769.0	458,493.0
Alabama	3,943	135,506.6	31,785.5	167,292.1	34.4	8.1	42.4	323,773.2	400,637.0
Mississippi	2,551	90,423.8	22,606.0	113,029.8	35.4	8.9	44.3	219,368.2	271,446.2
WEST SOUTH CENTRAL									
Arkansas	2,291	64,657.0	16,164.3	80,821.3	28.2	7.1	35.4	$158,431.9	$197,501.3
Louisiana	4,362	130,941.4	34,807.2	165,748.6	30.0	8.0	38.0	328,995.7	410,389.3
Texas	15,280	430,134.8	143,378.2	573,513.0	28.2	9.4	37.5	1,211,579.5	1,506,841.5
Oklahoma	3,177	86,742.5	24,465.9	111,208.4	27.3	7.7	35.0	223,448.3	282,081.3
MOUNTAIN									
Montana	801	16,351.0	4,611.9	20,962.9	20.4	5.8	26.2	$433,444.0	$55,712.6
Idaho	965	18,836.3	5,626.5	24,462.8	19.5	5.8	25.4	51,113.2	65,291.9
Wyoming	502	8,612.5	2,870.8	11,483.3	17.2	5.7	22.9	24,154.9	30,734.7
Colorado	3,045	74,497.7	24,832.6	99,330.3	24.5	8.2	32.6	212,094.9	269,551.5
New Mexico	1,359	31,150.8	10,329.6	41,480.4	22.9	7.6	30.5	87,744.0	111,320.7
Arizona	2,860	68,190.3	20,368.6	88,558.9	23.8	7.1	31.0	185,450.7	237,821.9
Utah	1,554	35,725.2	11,908.4	47,633.6	23.0	7.7	30.7	100,628.9	126,661.6
Nevada	881	22,193.0	7,596.2	29,789.2	25.2	8.6	33.8	63,809.4	81,669.6
PACIFIC									
Washington	4,245	95,017.6	26,790.7	121,808.3	22.4	6.3	28.7	$251,111.8	$315,873.5
Oregon	2,649	57,024.8	18,504.7	75,529.5	21.5	7.0	28.5	157,309.3	196,306.0
California	24,724	631,424.7	210,475.0	841,899.7	25.5	8.5	34.1	2,077,475.9	2,652,105.6
Alaska	438	14,554.2	3,397.0	17,951.2	33.2	7.8	41.0	32,045.4	43,322.1
Hawaii	994	25,707.2	8,569.1	34,276.3	25.9	8.6	34.5	70,077.3	89,267.5
Total U.S.	231,536	6,686,181.0	1,888,309.3	8,574,490.3	28.9	8.2	37.0	18,783,680.1	24,498,263.6

NOTE: Data does not include non-carbonated fruit flavored drinks marketed or produced by soft drink bottlers.
Bulk gallonage is projected on a finished drink basis.
SOURCE: Beverage World, August, 1983

TABLE 11-B
Soft Drink Industry State-by-State Consumption and Revenues—1983

State	Population (Thous.)	Packaged Gallons (Thous.)	Bulk Gallons (Thous.)	Total Gallons (Thous.)	Per Capita Packaged Gallons	Per Capita Bulk Gallons	Per Capita Total Gallons	Wholesale Dollars (Thous. $)	Retail Dollars (Thous. $)
NEW ENGLAND									
Maine	1,146	30,896.6	7,724.2	38,620.8	27.0	6.7	33.7	$66,147.7	$88,174.8
New Hampshire	959	26,250.7	5,171.9	31,422.6	27.4	5.4	32.7	67,314.1	83,545.8
Vermont	525	13,556.4	389.2	16,945.6	25.8	6.5	32.2	35,864.5	47,807.3
Massachusetts	5,767	158,981.5	44,276.9	203,458.4	27.6	7.7	35.2	480,524.1	640,538.7
Rhode Island	955	29,428.9	5,822.9	35,251.8	30.8	6.1	36.9	74,550.7	93,942.5
Connecticut	3,138	88,914.2	25,078.4	113,992.6	28.3	8.0	36.3	249,651.5	314,036.5
MIDDLE ATLANTIC									
New York	17,667	540,324.0	135,331.1	675,655.1	30.6	7.7	38.2	$1,763,888.3	$2,244,371.5
New Jersey	7,468	229,519.0	50,382.3	279,901.3	30.7	6.7	37.4	699,397.2	883,639.9
Pennsylvania	11,895	356,441.8	86,610.5	443,052.3	30.0	7.3	37.2	1,127,891.9	1,503,479.9
EAST NORTH CENTRAL									
Ohio	10,746	332,184.7	83,046.2	415,230.9	30.9	7.7	38.6	$993,491.5	$1,237,525.6
Indiana	5,479	155,998.3	43,999.6	199,997.9	28.5	8.0	36.5	468,742.0	577,334.1
Illinois	11,486	354,947.5	94,353.2	449,300.7	30.9	8.2	39.1	1,108,934.4	1,378,209.6
Michigan	9,069	288,587.6	72,396.9	360,984.5	31.8	8.0	39.8	781,418.8	980,711.9
Wisconsin	4,751	139,967.7	36,832.0	176,799.7	29.5	7.8	37.2	427,545.4	529,918.0
WEST NORTH CENTRAL									
Minnesota	4,144	134,981.7	29,630.2	164,611.9	32.6	7.2	39.7	$256,628.0	$317,085.1
Iowa	2,905	89,809.5	18,394.8	108,204.3	30.9	6.3	37.2	206,102.5	254,734.6
Missouri	4,970	170,781.7	37,488.7	208,270.4	34.4	7.5	41.9	408,793.9	509,922.4
North Dakota	680	17,220.1	4,039.4	21,259.5	25.3	5.9	31.2	40,279.6	51,692.7
South Dakota	700	19,365.4	4,841.4	24,206.8	27.7	6.9	34.5	47,654.6	59,523.6
Nebraska	1,597	48,853.2	12,986.3	61,839.5	30.6	8.1	38.7	124,353.1	155,762.7
Kansas	2,425	72,490.0	19,881.9	92,371.9	29.9	8.2	38.0	190,682.0	235,707.2
SOUTH ATLANTIC									
Delaware	606	19,509.4	4,877.4	24,386.8	32.2	8.0	40.2	$49,349.0	$61,782.3
Maryland	4,304	144,467.7	37,117.0	181,584.7	33.6	8.6	42.1	410,504.9	515,211.0
D.C.	623	23,896.8	6,458.1	30,354.9	38.4	10.4	48.7	68,321.9	86,073.0
Virginia	5,550	185,165.7	46,291.5	231,457.2	33.4	8.3	41.7	503,676.2	631,400.3
West Virginia	1,965	67,860.1	16,715.1	84,575.2	34.5	8.5	43.0	182,118.7	232,764.2
North Carolina	6,082	214,067.7	54,017.0	268,084.7	35.2	8.9	44.0	613,898.6	818,326.9
South Carolina	3,264	128,755.6	31,352.8	160,108.4	39.4	9.6	49.0	364,399.0	485,743.9
Georgia	5,732	213,629.1	56,787.5	270,416.6	37.3	9.9	47.1	607,295.1	789,524.4
Florida	10,680	303,148.0	85,503.4	388,651.4	28.4	8.0	36.3	831,097.0	1,100,852.3
EAST SOUTH CENTRAL									
Kentucky	3,714	127,971.8	30,018.1	157,989.9	34.5	8.1	42.5	$329,463.9	$409,175.4
Tennessee	4,685	184,627.2	46,156.9	230,784.1	39.4	9.9	49.2	407,845.9	503,658.6
Alabama	3,959	142,663.6	35,666.0	178,329.6	36.0	9.0	45.0	356,150.5	450,668.8
Mississippi	2,587	95,536.5	23,884.2	119,420.7	36.9	9.2	46.1	241,305.0	318,659.6
WEST SOUTH CENTRAL									
Arkansas	2,328	69,255.8	16,202.5	85,458.3	29.7	7.0	36.7	$174,275.1	$217,308.7
Louisiana	4,438	144,213.5	31,656.7	175,870.2	32.5	7.1	39.6	361,895.3	452,908.9
Texas	15,724	490,132.1	127,630.1	617,762.2	31.2	8.1	39.2	1,332,737.4	1,676,539.0
Oklahoma	3,298	98,024.3	20,077.3	118,101.6	29.7	6.1	35.8	245,793.1	307,064.2
MOUNTAIN									
Montana	817	18,107.2	4,547.5	22,654.7	22.2	5.6	27.7	$47,788.4	$60,701.9
Idaho	989	21,176.8	5,044.3	26,221.1	21.3	5.1	26.5	56,224.5	70,556.5
Wyoming	514	9,554.0	2,388.6	11,942.6	18.6	4.6	23.2	26,570.4	34,071.4
Colorado	3,139	81,506.4	22,989.1	104,495.5	26.0	7.3	33.2	233,304.4	309,312.1
New Mexico	1,399	35,392.6	8,249.2	43,641.8	25.3	5.9	31.1	92,131.2	122,810.9
Arizona	2,963	74,529.7	20,457.1	94,986.8	25.2	6.9	32.0	203,995.8	260,926.4
Utah	1,619	40,075.6	9,797.1	49,872.7	24.8	6.1	30.8	112,704.4	150,235.0
Nevada	891	24,433.7	6,894.5	31,338.2	27.4	7.7	35.1	70,190.3	90,563.7
PACIFIC									
Washington	4,300	103,841.9	25,960.5	129,802.4	24.1	6.0	30.1	$276,223.0	$351,667.2
Oregon	2,662	64,349.5	15,125.6	79,475.1	24.2	5.7	29.8	173,040.2	216,121.3
California	25,174	693,415.8	195,578.9	888,994.7	27.5	7.8	35.3	2,285,223.5	3,006,202.9
Alaska	479	15,346.4	4,143.3	19,489.7	32.0	8.6	40.6	35,249.9	46,988.2
Hawaii	1,023	29,627.6	7,156.9	36,784.5	29.0	7.0	35.9	77,085.0	104,622.6
Total U.S.	233,980	7,163,792.6	1,820,422.2	8,984,214.8	30.6	7.8	38.4	20,389,713.4	26,070,106.0

NOTE: Data does not include non-carbonated fruit flavored drinks marketed or produced by soft drink bottlers. Bulk gallonage is prorated on a finished drink basis.
SOURCE: Beverage World, April, 1984

TABLE 11-C
Soft Drink Industry State-by-State Consumption and Revenues—1984

State	Population (Thous.)	Packaged Gallons (Thous.)	Bulk Gallons (Thous.)	Total Gallons (Thous.)	Per Capita Packaged Gallons	Per Capita Bulk Gallons	Per Capita Total Gallons	Wholesale Dollars (Thous. $)	Retail Dollars (Thous. $)
NEW ENGLAND									
Maine	1,156	31,779.2	9,439.0	41,218.2	27.5	8.2	35.6	$70,192.7	$93,356.3
New Hampshire	977	26,463.4	9,298.0	35,761.4	27.1	9.5	36.6	69,423.8	91,639.4
Vermont	530	14,313.0	4,796.5	19,109.5	27.0	9.1	36.1	40,894.3	53,571.5
Massachusetts	5,789	164,348.9	45,816.0	210,164.9	28.3	7.9	36.2	506,952.9	674,247.3
Rhode Island	962	29,906.3	8,933.0	38,839.3	31.1	9.3	40.3	79,820.6	100,573.9
Connecticut	3,154	84,986.4	35,390.9	120,377.3	26.9	11.2	38.1	258,811.2	323,514.0
MIDDLE ATLANTIC									
New York	17,735	500,641.8	193,729.6	694,371.4	28.2	10.9	39.1	$1,819,253.0	$2,310,451.3
New Jersey	7,515	235,029.1	66,290.3	301,319.4	31.3	8.8	40.1	746,443.4	947,983.1
Pennsylvania	11,901	361,243.5	88,064.3	449,307.8	30.4	7.4	37.7	1,150,227.9	1,536,704.4
EAST NORTH CENTRAL									
Ohio	10,752	337,119.4	100,689.0	437,817.4	31.4	9.4	40.7	$1,050,761.8	$1,302,944.6
Indiana	5,498	155,602.0	50,220.8	205,822.8	28.3	9.1	37.4	485,741.2	597,461.7
Illinois	11,511	356,299.5	111,899.6	468,199.1	31.0	9.7	40.7	1,165,815.8	1,884,249.8
Michigan	9,075	272,972.7	111,495.9	384,468.6	30.1	12.3	42.4	790,422.6	1,006,998.4
Wisconsin	4,766	148,926.1	40,306.6	189,232.7	31.2	8.5	39.7	194,116.8	240,704.8
WEST NORTH CENTRAL									
Minnesota	4,162	128,360.1	43,015.2	171,375.3	30.8	10.3	41.1	$269,628.0	$334,338.7
Iowa	2,910	83,008.9	27,669.6	110,678.5	28.5	9.5	38.0	210,444.1	258,846.2
Missouri	5,008	172,999.2	51,675.1	224,674.3	34.5	10.3	44.9	413,981.2	509,196.8
North Dakota	586	18,810.8	5,336.6	24,147.4	32.1	9.1	41.2	46,363.1	59,854.7
South Dakota	706	21,022.2	5,929.4	26,951.6	29.8	8.4	38.1	53,903.2	68,998.6
Nebraska	1,606	51,811.2	15,563.6	67,374.8	32.3	9.7	41.9	138,118.3	180,934.9
Kansas	2,438	77,772.3	20,673.7	98,446.0	31.9	8.5	40.3	206,736.6	254,286.0
SOUTH ATLANTIC									
Delaware	613	22,246.6	5,184.5	27,431.1	36.3	8.5	44.7	$56,233.7	$75,184.4
Maryland	4,349	152,066.2	40,422.7	192,488.9	35.0	9.3	44.2	442,724.5	553,405.6
D.C.	623	25,615.7	6,506.9	32,122.6	41.1	10.4	51.5	78,481.9	98,887.1
Virginia	5,636	200,670.0	245,317.9	245,317.9	35.6	7.9	43.5	544,605.8	713,433.6
West Virginia	1,952	68,837.0	18,408.9	87,245.9	35.3	9.4	44.7	191,940.9	245,684.3
North Carolina	6,165	219,001.6	64,312.3	283,313.9	35.5	10.4	45.9	665,787.1	885,496.8
South Carolina	3,300	128,053.9	34,039.6	162,093.5	38.8	10.3	49.1	379,298.4	500,673.8
Georgia	5,837	222,984.7	65,481.9	288,466.6	38.2	11.2	49.4	663,473.2	870,476.8
Florida	10,976	336,700.2	84,925.1	421,625.3	30.7	7.7	38.4	910,586.9	1,201,974.7
EAST SOUTH CENTRAL									
Kentucky	3,723	133,836.0	38,878.3	167,714.3	35.9	9.1	45.0	$360,585.1	$448,928.4
Tennessee	4,717	190,435.7	51,712.6	242,148.3	40.4	11.0	51.3	451,674.3	565,496.2
Alabama	3,990	147,286.3	41,784.7	189,071.0	36.9	10.5	47.3	391,376.9	493,134.8
Mississippi	2,598	91,595.7	37,412.3	129,008.0	35.3	14.4	49.6	268,336.6	354,204.3
WEST SOUTH CENTRAL									
Arkansas	2,349	69,263.6	22,719.9	91,983.5	29.5	9.7	39.1	$193,165.3	$239,524.9
Louisiana	4,462	142,919.2	42,690.2	185,609.4	32.0	9.6	41.6	393,491.9	487,929.9
Texas	15,989	510,379.6	152,451.0	662,830.6	31.9	9.5	41.5	1,471,483.9	1,876,141.9
Oklahoma	3,298	96,708.5	28,887.0	125,595.5	29.3	8.8	38.1	271,286.9	345,348.2
MOUNTAIN									
Montana	824	20,080.2	5,305.6	25,385.8	24.4	6.4	30.8	$54,833.3	$66,896.6
Idaho	1,001	22,823.9	6,664.4	29,488.3	22.8	6.7	29.5	64,874.3	80,703.6
Wyoming	511	11,244.4	2,989.0	14,233.4	22.0	5.8	27.9	32,452.5	41,669.0
Colorado	3,178	87,840.0	25,795.2	113,635.2	27.6	8.1	35.8	261,360.9	340,291.9
New Mexico	1,424	37,169.9	10,915.4	48,085.3	26.1	7.7	33.8	104,345.1	132,831.3
Arizona	3,053	78,805.8	25,705.2	104,511.0	25.8	8.4	34.2	225,524.2	290,700.7
Utah	1,652	41,576.5	11,118.7	52,695.2	25.2	6.7	31.9	121,198.9	155,982.9
Nevada	911	27,466.1	8,204.2	35,670.3	30.1	9.0	39.2	82,041.7	109,033.4
PACIFIC									
Washington	4,349	106,792.3	32,623.2	139,415.5	24.6	7.5	32.1	$306,714.1	$391,980.6
Oregon	2,674	65,049.1	19,430.3	84,479.4	24.3	7.3	31.6	190,078.6	239,118.8
California	25,622	748,886.0	211,275.3	960,161.3	29.2	8.2	37.5	2,515,622.6	3,300,496.8
Alaska	500	16,427.3	4,906.9	21,334.2	32.9	9.8	42.6	40,534.9	50,303.8
Hawaii	1,039	31,590.1	8,858.3	40,448.4	30.4	8.5	38.9	87,369.8	118,123.9
Total U.S.	236,061	7,327,768.1	2,195,499.2	9,523,267.3	31.0	9.3	40.3	21,589,536.7	28,104,915.4

NOTE: Data does not include non-carbonated fruit flavored drinks marketed or produced by soft drink bottlers. Bulk gallonage is projected on a finished drink basis.
SOURCE: Beverage World, May, 1985.

TABLE 11-D
Soft Drink Industry Regional Consumption and Revenues—1985

Region	Population (Thous.)	Packaged Gallons (Thous.)	Bulk Gallons (Thous.)	Total Gallons (Thous.)	Per Capita Packaged Gallons	Per Capita Bulk Gallons	Per Capita Total Gallons	Wholesale Dollars (Thous. $)	Retail Dollars (Thous. $)
New England	12,700	381,200	125,200	506,400	30.0	9.9	39.9	$1,159,000	$1,448,400
Middle Atlantic	37,200	1,135,400	435,500	1,570,200	30.5	11.7	42.2	3,949,800	5,211,500
East North Central	41,600	1,349,200	481,000	1,830,200	32.4	11.6	44.0	4,137,600	5,350,800
West North Central	17,500	593,200	192,300	785,500	33.9	11.0	44.9	1,571,300	2,010,900
South Atlantic	40,200	1,495,000	396,700	1,891,700	37.2	9.9	47.1	4,282,100	5,494,500
East South Central	15,100	606,900	181,100	788,000	40.2	12.0	52.2	1,606,000	2,017,300
West South Central	26,500	886,200	266,800	1,153,000	33.4	10.1	43.5	2,564,800	3,191,700
Mountain	12,800	348,000	106,700	454,700	27.2	8.3	35.5	1,041,200	1,322,900
Pacific	35,000	975,000	379,300	1,354,600	27.9	10.8	38.7	3,458,700	4,378,200
Total U.S.	238,700	7,770,400	2,564,600	10,335,000	32.6	10.7	43.3	23,770,500	30,426,200

NOTE: Data does not include non-carbonated fruit flavored drinks marketed or produced by soft drink bottlers. Bulk gallonage is projected on a finished drink basis.
SOURCE: Beverage World, May, 1986.

TABLE 12
Soft Drink Manufacturers
Approximate Number of Plants in United States
1970-1985

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985
Total U.S.	3,054	2,913	2,797	2,692	2,613	2,396	2,246	2,174	2,079	1,992	1,859	1,747	1,643	1,599	1,519	1,423
NORTHEASTERN																
Connecticut	52	51	48	47	46	39	37	39	37	37	31	29	29	28	28	27
Delaware	10	9	7	6	6	6	6	5	4	4	4	4	4	4	4	4
District of Columbia	2	2	1	1	1	1	1	1	1	2	1	0	0	0	0	0
Maine	28	25	25	23	22	20	19	18	18	18	17	15	16	14	13	12
Maryland	36	35	36	37	38	36	36	35	34	33	35	35	27	26	25	23
Massachusetts	85	81	74	74	73	70	69	63	61	60	54	40	41	39	39	37
New Hampshire	15	14	15	14	12	10	9	11	10	10	9	9	8	8	9	9
New Jersey	91	79	74	73	70	55	52	46	45	38	37	37	36	32	32	29
New York	171	165	160	154	153	141	129	116	114	106	99	96	90	85	78	74
Pennsylvania	234	221	213	193	190	171	150	139	133	129	125	117	104	101	94	85
Rhode Island	19	17	17	16	14	14	13	13	11	10	10	9	9	9	9	9
Vermont	10	8	7	7	6	6	6	5	5	5	5	6	5	5	4	4
SOUTHERN																
Alabama	73	71	66	59	59	52	47	45	41	39	33	29	29	28	26	24
Arkansas	53	52	49	47	46	40	37	32	30	29	28	25	25	25	21	20
Florida	96	91	88	84	81	68	62	61	59	57	49	45	39	37	37	36
Georgia	98	94	92	84	82	78	75	71	69	69	64	64	63	62	55	55
Louisiana	54	51	45	46	47	46	42	41	42	41	39	38	30	30	28	23
Mississippi	66	62	57	55	53	46	42	44	40	37	33	31	29	29	22	21
North Carolina	114	106	102	101	99	85	82	87	84	81	76	73	72	72	69	64
South Carolina	63	63	54	53	50	45	42	43	38	36	33	31	28	28	27	24
Tennessee	77	73	73	72	68	62	60	60	56	53	50	47	44	43	37	38
Virginia	65	61	59	57	53	51	52	49	45	43	40	40	36	35	36	34
EAST CENTRAL																
Illinois	112	104	98	96	84	80	70	69	64	60	54	53	50	49	50	47
Indiana	82	76	76	76	72	64	57	51	48	47	46	43	40	40	40	40
Kentucky	62	61	56	54	53	52	47	45	44	41	38	36	35	35	35	31
Michigan	84	83	80	77	73	67	64	64	57	56	53	49	49	46	44	43
Ohio	110	106	104	101	99	84	82	78	77	71	70	66	61	59	58	55
West Virginia	51	50	45	43	41	37	36	35	33	31	29	28	26	26	25	24
Wisconsin	111	112	108	104	102	92	86	85	77	74	68	62	62	59	55	50
WEST CENTRAL																
Iowa	42	39	38	35	29	28	29	28	27	24	23	22	21	21	21	20
Kansas	38	36	34	33	32	30	28	29	30	28	25	23	22	22	21	21
Minnesota	60	56	55	51	52	47	48	49	45	44	41	38	39	38	35	32
Missouri	77	70	69	69	65	61	55	51	48	45	45	40	35	35	35	35
Nebraska	31	30	30	28	28	26	25	25	26	25	24	24	21	21	20	19
North Dakota	13	13	12	12	11	11	11	12	9	9	9	9	9	9	9	7
South Dakota	11	10	10	10	10	10	10	10	10	10	10	9	8	8	7	8
SOUTHWESTERN																
Arizona	23	23	26	23	25	25	23	23	23	23	23	22	21	20	19	16
New Mexico	27	27	26	25	25	22	22	19	20	20	19	17	15	15	15	13
Oklahoma	52	52	51	49	49	44	44	42	40	35	34	31	28	28	27	26
Texas	198	183	178	174	170	163	148	147	143	135	131	124	108	107	103	94
WESTERN																
Colorado	34	34	34	34	36	32	26	26	24	24	21	18	17	17	17	17
Idaho	17	17	16	14	14	15	15	15	15	14	14	14	12	11	11	10
Montana	25	25	24	22	21	20	21	19	20	19	17	18	18	18	17	16
Nevada	11	11	11	10	10	11	10	10	10	10	10	8	6	6	7	7
Utah	25	25	25	24	22	21	21	22	21	20	18	15	14	14	12	11
Wyoming	10	10	10	9	9	9	9	9	7	8	7	6	5	5	5	4
PACIFIC																
Alaska	7	7	7	6	6	5	5	4	4	4	4	4	4	4	4	3
California	141	137	133	132	129	125	117	113	114	111	95	91	95	90	83	74
Hawaii	18	17	14	15	15	13	10	10	7	8	7	7	7	7	7	7
Oregon	35	34	32	31	31	31	27	27	27	27	25	24	25	25	23	22
Washington	35	34	33	32	31	30	32	34	32	32	27	26	26	24	21	19

SOURCE: National Soft Drink Association, Beverage Industry 1986 Annual Manual

TABLE 13
Soft Drink Industry Statistics by State 1983

State	Soft Drink Plants	Number of establishments by employment-size class		Total Employees	Payroll (Thous.$)
		under 100	100 or more		
Alabama	26	19	7	F	D
Alaska	N/A	N/A	N/A	N/A	N/A
Arizona	23	17	6	E	D
Arkansas	25	17	8	1,833	30,013
California	95	71	24	8,087	193,408
Colorado	21	14	7	E	D
Connecticut	27	24	3	C	D
Delaware	2	1	1	A	D
District of Columbia	N/A	N/A	N/A	N/A	N/A
Florida	43	28	15	4,383	78,502
Georgia	45	36	9	2,872	45,093
Hawaii	7	5	2	B	D
Idaho	7	7	0	262	4,446
Illinois	66	54	12	4,182	97,178
Indiana	41	31	10	3,790	78,933
Iowa	24	18	6	1,360	27,520
Kansas	25	22	3	E	D
Kentucky	36	26	10	2,824	55,421
Louisiana	30	17	13	3,470	59,642
Maine	10	8	2	B	D
Maryland	24	17	7	2,432	48,171
Massachusetts	40	34	6	1,946	42,249
Michigan	39	32	7	2,552	57,149
Minnesota	35	30	5	2,011	38,287
Mississippi	28	22	6	1,834	28,691
Missouri	43	37	6	F	D
Montana	12	12	0	B	D
Nebraska	18	14	4	E	D
Nevada	6	6	0	B	D
New Hampshire	1	0	1	A	D
New Jersey	35	28	7	1,902	46,753
New Mexico	14	13	1	657	11,300
New York	83	68	15	4,910	118,588
North Carolina	67	54	13	F	D
North Dakota	6	6	0	B	D
Ohio	56	33	23	6,293	134,668
Oklahoma	26	21	5	E	D
Oregon	19	17	2	907	15,171
Pennsylvania	86	71	15	5,212	101,890
Puerto Rico	14	10	4	1,155	16,475
Rhode Island	8	7	1	A	D
South Carolina	24	18	6	E	D
South Dakota	8	8	0	B	D
Tennessee	46	31	15	4,169	75,103
Texas	99	73	26	11,093	203,035
Utah	13	10	3	C	D
Vermont	5	3	2	263	4,330
Virginia	32	17	15	F	D
Washington	25	22	3	1,202	30,886
West Virginia	23	21	2	E	D
Wisconsin	57	47	10	F	D
Wyoming	5	4	1	253	4,744
Totals	1,550	1,201	349		

Note: N/A Not Available
A=100-249; B=250-499; C=500-999; E=1,000-2,499; F=2,500-4,999; D=Data Not Disclosed
Source: U.S. Department of Commerce, Bureau of the Census, County Business Patterns, 1983

TABLE 13-A
Soft Drink Industry Statistics by State 1984

State	Soft Drink Plants	Number of establishments by employment-size class		Total Employees	Payroll (Thous. $)
		under 100	100 or more		
Alabama	24	18	6	F	D
Alaska	N/A	N/A	N/A	N/A	N/A
Arizona	23	16	7	E	D
Arkansas	22	16	6	1,883	30,910
California	100	78	22	8,605	212,161
Colorado	18	16	2	2,010	46,793
Connecticut	22	20	2	619	14,022
Delaware	2	1	1	A	D
District of Columbia	N/A	N/A	N/A	N/A	N/A
Florida	42	26	16	4,934	97,137
Georgia	44	36	8	2,838	47,971
Hawaii	7	5	2	B	D
Idaho	7	7	0	279	5,412
Illinois	57	47	10	3,870	99,721
Indiana	40	29	11	3,926	82,806
Iowa	22	19	3	1,310	25,978
Kansas	1	0	1	E	D
Kentucky	35	25	10	F	D
Louisiana	27	13	14	F	D
Maine	11	9	2	C	D
Maryland	26	18	8	F	D
Massachusetts	40	34	6	1,956	46,547
Michigan	39	32	7	2,736	66,892
Minnesota	33	28	5	2,342	56,014
Mississippi	27	21	6	E	D
Missouri	41	34	7	2,757	65,091
Montana	12	12	0	440	10,342
Nebraska	19	18	1	925	16,195
Nevada	6	6	0	B	D
New Hampshire	5	4	1	A	D
New Jersey	32	27	5	1,545	39,035
New Mexico	12	11	1	C	D
New York	81	62	19	5,703	142,997
North Carolina	65	52	13	F	D
North Dakota	6	6	0	B	D
Ohio	51	29	22	6,084	130,255
Oklahoma	25	20	5	E	D
Oregon	21	19	2	1,025	23,661
Pennsylvania	83	71	12	4,739	101,731
Puerto Rico	9	5	4	950	16,705
Rhode Island	9	9	0	184	3,948
South Carolina	24	18	6	E	D
South Dakota	8	8	0	A	D
Tennessee	45	29	16	4,213	75,858
Texas	96	67	29	11,255	216,290
Utah	11	9	2	779	11,434
Vermont	4	3	1	233	3,918
Virginia	34	19	15	F	D
Washington	24	20	4	1,336	33,996
West Virginia	23	21	2	E	D
Wisconsin	54	43	11	2,751	60,022
Wyoming	4	3	1	196	4,739
Totals	1,473	1,139	335		

NOTE: N/A = Not Available
D = Data Not Disclosed
A = 100-249; B = 250-499; C = 500-999; E = 1,000-2,499; F = 2,500-4,999.
SOURCE: U.S. Department of Commerce, Bureau of the Census, County Business Patterns, 1985.

Section III

Soft Drink Industry Packaging

During the last fifteen years, larger sized containers have shown dramatic gains. The smaller 6-9 ounce units have lost market share and in 1983, the last time they were measured by NSDA as a distinct category, constituted less than 1% of total packaged volume, while in 1966 they held almost 23% of the market. The 10-12 ounce container continues to dominate with over 40% of the total packaged market in 1985, although in recent years, this size group has begun to lose market share. In contrast, the 48-64 ounce/2 liter and larger sizes have shown growth in market share rising from 2.5% in 1974 to 24.8% in 1985.

Closures used for soft drink containers have decreased substantially since 1965. This decrease may be attributed to the increased size of containers and greater use of cans throughout the last decade.

One-way containers continue to dominate as the preferred form of packaging in the soft drink industry. Cans, one-way bottles and plastic containers combined represented nearly 84% of the packaged volume in 1985. In 1970 refillable containers comprised approximately 60% of the market.

The plastic beverage bottle is one of the great success stories in packaging of the 1970's. Since its introduction in 1978, plastic bottles have been capturing an increasing market share. In 1978, plastic containers accounted for 7.6% of the market and have grown to 26.8% of the volume of the packaged sales market in 1985. Plastic beverage bottles for soft drink use experienced a compound annual growth rate of over 10% between 1979 and 1984 and over 2.5 billion units were sold during 1984. While the dominant size for plastics is 2 liters, other sizes including the 1-liter, half-liter, 3-liter and 4-liter package have been introduced.

Can shipments have been steadily increasing throughout the last ten years with the exception of 1981, which was down slightly from 1980. Use of cans reached 70.2 million base boxes in 1984. (Base boxes are the standard measure of metal usage for cans in the industry, a factor of 2.03 base boxes per thousand cans shipped is applied to beer and soft drink cans.) The nonrefillable glass bottle has maintained a relatively steady volume since 1970.

TABLE 14
Soft Drink Industry Package Size Mix
(% of total packaged volume)
1965-1985

Year	6-9 oz.	10-12 oz.	16 oz. 1 2 liter	24-32 oz. 1 liter	48-64 oz. 2 liter[1]	Total
1985	46.1%[2]	–	25.8%	3.3%	24.8%	100.0%
1984	45.3[2]	–	26.5	5.3	22.9	100.0
1983	42.8[2]	–	27.9	6.2	23.1	100.0
1982	0.7	44.6%	26.2	7.0	21.5	100.0
1981	1.5	49.9	22.2	10.2	16.2	100.0
1980	1.9	51.9	19.6	11.6	15.0	100.0
1979	2.3	54.3	17.3	12.9	13.2	100.0
1978	2.7	55.8	17.3	14.9	9.3	100.0
1977	3.2	55.4	18.6	16.5	6.3	100.0
1976	3.9	53.2	19.6	17.3	6.0	100.0
1975	4.8	52.7	20.6	17.2	4.7	100.0
1974	5.7	54.9	20.3	16.6	2.5	100.0
1973	6.8	58.0	19.9	15.3	[1]	100.0
1972	8.7	58.2	20.4	12.7	–	100.0
1971	10.4	60.0	19.4	10.2		100.0
1970	12.7	61.2	16.5	9.6		100.0
1969	15.0	62.4	15.1	7.5		100.0
1968	17.4	62.5	13.1	7.0		100.0
1967	18.5	60.1	15.2	6.2		100.0
1966	22.9	56.5	15.0	5.6		100.0
1965	24.8	56.6	13.2	5.4		100.0

[1]Figure also includes 1 liter and larger PET.
[2]6-9 oz. figure also includes 10-12 oz. category.
[3]Prior to 1974 all large size containers were included in the 24-32 oz. category.
SOURCE: National Soft Drink Association, Sales Survey of the Soft Drink Industry, 1965-1985.

TABLE 15
Closures for Soft Drink Containers
1965, 1970, 1975-1985

Year	Metal Crowns Quantity (Thous. gross)	Metal Crowns Convenience Type Quantity (Thous. gross)	Metal Crowns Conventional Type Quantity (Thous. gross)	Value (Thous. $)
1985	64,900			$38,236
1984	71,206			45,262
1983	71,274			49,778
1982	86,075	7,060	79,015	52,127
1981	107,527	10,331	85,674	53,519
1980	108,935	18,523	90,412	65,162
1979	103,760	4,526	99,234	53,941
1978	134,393			63,026
1977	127,420			56,254
1976	128,072			55,803
1975	107,984			42,731[1]
1970	203,876			54,457
1965	235,551			N.A.

Note: Prior to 1979 there was no break out of convenience and conventional type.
N.A. = Not Available.
Definitions:
Convenience Type: Metal crowns which twist on and twist off.
Conventional Type: Metal crowns which pop off with an opener.
SOURCE: U.S. Department of Commerce, Census Bureau, Current Industrial Reports, [illegible]

TABLE 16
Soft Drink Industry Packaging Mix
(% of total packaged volume)

Year	Cans	Refillable Glass	One Way Glass	Plastic	Aseptics
1985	42.5%	16.3%	14.3%	26.8%	0.1%
1984	40.5	20.1	15.1	24.2	0.1
1983	37.7	23.3	14.4	24.6	
1982	36.5	26.4	15.7	21.4	
1981	36.0	29.0	15.1	19.9	
1980	37.2	30.7	14.2	17.9	
1979	42.5	33.8	9.1	14.6	
1978	43.8	37.8	10.8	7.6	
1977	38.2	40.3	21.5		
1976	34.5	44.0	21.5		
1975	32.0	47.0	21.0		
1974	29.0	53.0	18.0		
1973	29.0	54.0	17.0		
1972	25.0	57.0	18.0		
1971	21.0	59.0	20.0		
1970	20.0	60.0	20.0		

SOURCE: National Soft Drink Association Sales Surveys of the Soft Drink Industry, 1970-1985.

TABLE 17
Total Shipments of Soft Drink Containers
1965-1985

	Cans		Nonrefillable Bottles Gross	Refillable Bottles Gross	Plastic[1] Beverage Bottles
Year	Base Boxes (Thous.)	Cans (Mil.)	(Thous.)	(Thous.)[2]	(Mil.)
1985	70,163	34,563	58,532	1,553	N/A
1984	63,519	31,290	59,475	2,100	2,554
1983	57,490	28,321	59,234	3,383	2,663
1982	53,197	26,205	57,291	3,729	2,737
1981	51,613	25,425	56,110	4,138	2,582
1980	52,255	25,741	53,123	4,582	2,219
1979	52,193	25,711	48,962	6,033	1,185
1978	51,701	25,468	55,015	6,388	624
1977	47,424	23,313	60,311	7,155	
1976	39,615	19,515	56,397	8,696	
1975	33,544	16,532	56,804	7,614	
1974	36,500	17,980	58,410	7,221	
1973	35,631	17,552	62,593	8,407	
1972	31,660	15,596	60,954	10,099	
1971	29,400	14,700	57,442	9,610	
1970	26,400	13,200	57,937	11,317	
1969	23,527	11,764	44,297	11,388	
1968	20,055	10,028	32,252	12,132	
1967	14,580	7,290	24,899	13,286	
1966	11,254	5,627	13,747	13,451	
1965	7,683	3,841	6,989	13,294	

[1] 26 to 30 percent estimated.
[2] Refillable bottles represent shipments from bottle manufacturers and not sweat. NSDA estimates for the containers used by soft drink industry marketed in refillable bottles (individual use is less than this figure because the containers are used more than once).
NOTE: N/A = Not Available.
SOURCE: U.S. Department of Commerce, Census Bureau, Current Industrial Reports, 1965-1985; Can Manufacturers Institute, Metal Can Shipment Report 1972-1977, revised; 1984; Glass Packaging Institute, Annual Report, 1960-1981.

Section IV

Soft Drink Producer Price Index, Retail Prices and Consumer Price Index

The producer price index (formerly the wholesale price index) includes in addition to the traditional commodity-based index, a new industry-based index. Traditional indices are based on a selection of the most important commodities without specific industry classification of the producer. The data used in the industry-based indices are obtained from establishments which produce soft drinks as their primary product.

New indices differ from traditional indices in that the entire output of each industry is sampled, making the new indices more applicable to production within a specific industry. The commodity-based index includes data from establishments which produce soft drinks primarily or secondarily. New indices are also easier to cross-reference with other industry data because the data are classified according to the Standard Industrial Classification (SIC) code.

In the past six years, the traditional commodity-based producer price index for cola type soft drinks has risen by 7.4% annually. That is a slightly faster rate than for other soft drink flavors. In 1985, cola-flavored drinks had a commodity-based index of 355.7 and the total soft drink commodity-based index was 342.6. These represent a 1.4% and 0.7% increase respectively from the previous year's indices. The traditional producer price index for ginger ale and club soda for 1985 was 293.4 and 217.8. These represent a 7.0% decrease and a 2.4% increase, respectively, from the previous year. These indices measure the wholesale price of soft drinks packaged in both refillable and one-way containers.

According to the industry-based producer price index for soft drinks, prices for carbonated soft drinks (including diet cola) increased by less than 1% in 1985 while non-carbonated soft drinks increased by almost 6% during this period. The Soft Drink Producer Price Index for net output of industry for primary and secondary products in 1985 were 112.7 and 108.4 respectively. This represents a 1.1% increase from the previous year for primary products and a 0.2% increase for secondary products. The largest price increase in 1985 as shown by the new producer price index for soft drinks was that of non-carbonated fruit drinks and ades with 5.8% increase from 1984. The most significant decrease came from the price index for ginger ale, down 5.2% from 1984.

During 1985, the largest increase in annual retail prices for refillable bottles occurred in the Southern region, as defined by the U.S. Bureau of the Census. Non-diet cola in refillable bottles, 6- or 8-pack, increased 5.3% in the region from 117.9 cents in 1984 to 124.2 cents in 1985. This is above the U.S. average which rose 0.6% from 124.0 cents to 124.7 cents from 1984 to 1985. Retail prices for soft drinks in cans, priced per 6-pack, grew at the fastest rate in the North Central region during 1985. The U.S. average increased at a rate of 0.9% while the North Central increased at a rate of 1.2% from 221.4 cents in 1984 to 224.1 cents in 1985. The Northeast region in 1985 had the overall highest prices for cans at 235.8 cents per 6-pack or 6.7% above the U.S. average.

Between 1979 and 1985, the consumer price index for cola-flavored drinks has risen annually at 5.1%. For the same period, carbonated soft drink prices (including diet cola) increased annually by 4.4%.

Soft drink industrial production indices were obtained from the *Federal Reserve Statistical Release*. The indices of industrial production are constructed from monthly data of two types. The first is directly measured output in physical units obtained from the Bureau of Census, other government agencies and trade associations. The second type of data are estimates of physical output based on input data collected from the Bureau of Labor Statistics and from utilities and self generators by the Federal Reserve Banks.

The index for soft drink industrial production fell by 1.8% in 1985 according to the U.S. Department of Commerce. The production index fell from 138.5 in 1984 to 136.1 in 1985. However, between January and May of 1986 the soft drink production index rose from 128.5 to 140.3. This shows a 9.2% increase during this time period.

TABLE 18
Soft Drink Producer Price Index for Commodity Groupings and Individual Items
Annual Averages
Index: 1967 = 100

Year	Total Soft Drinks	Cola Drinks		Ginger Ale	Club Soda	Lemon/Lime[1]
		Total	Bottled			
1985	342.6	355.7	365.9	293.4	217.8	284.8
1984	340.2	350.9	358.9	315.6	212.7	279.3
1983	327.4	336.3	340.5	300.9	226.8	270.0
1982	319.2	325.7	330.7	295.3	N/A	261.1
1981	305.1		313.0	275.1	224.5	
1980	261.0		267.1			
1979	227.1		232.2			
1978	211.6		216.3			
1977	198.1		201.5			
1976	187.2		190.1			
1975	186.1		188.5			
1974	149.7		148.6			
1973	125.6		124.4			
1972	126.4		126.3			
1971	124.0		123.7			
1970			121.5			
1969			115.3			
1968			107.8			

[1]Base year = December 1968.
NOTE: Producer Price Index measures soft drinks packaged in both refillable and one-way containers.
N/A = Not Available.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Producer Price Indexes, 1968-1985.

TABLE 19
Soft Drink Producer Price Index for Net Output of Industry
Annual Averages
Index: June 1981 = 100

	1982	1983	1984	1985
Soft drinks	104.4	107.3	111.3	112.7
Primary products	104.8	107.6	111.5	112.7
Carbonated soft drinks	104.7	107.7	111.5	112.4
Cola, excluding diet cola	103.3	106.8	111.0	112.4
Cola, bottled, excluding diet cola	105.5	108.6	114.5	116.6
Cola, excluding diet, returnable bottles	107.6	110.7	117.3	120.0
Cola, excluding diet, nonreturnable bottles	N/A	104.8	109.4	110.5
Cola, excluding diet, cans (returnable and nonreturnable)	99.7	104.7	106.6	106.3
Cola, excluding diet, bulk	N/A	102.1	103.4	106.8
Other carbonated drinks, including diet cola	106.3	108.7	112.0	112.5
Carbonated orange soda	103.5	105.4	108.2	106.5
Carbonated lemon, lime and lemon-lime combinations	104.3	107.9	111.6	113.6
Rootbeer and sarsaparilla	105.3	108.4	112.7	108.7
Ginger ale	106.4	108.9	114.3	108.3
Carbonated grape soda	102.1	103.1	109.2	108.0
Club soda	N/A	111.0	103.7	106.2
Other carbonated non diet flavors	106.9	108.6	111.8	112.7
Diet cola	107.1	110.2	111.6	110.9
Other carbonated diet flavors	109.2	111.8	116.7	119.8
Noncarbonated soft drinks	105.5	105.6	112.3	118.9
Other noncarbonated fruit drinks and ades	107.4	107.4	111.7	118.2
Miscellaneous receipts	102.2	105.3	110.7	112.6
Resales	102.3	105.7	111.2	113.5
Secondary products	106.2	107.7	108.2	108.4

NOTE: N/A = Not Available.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Producer Prices and Price Indexes, 1982 - 1985.

TABLE 20
Producer Price Index—Soft Drink Materials
Index: 1967 = 100 unless otherwise noted
1971-1985

Material	Annual Average Index														
	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985
Sugar (Cane Raw)	117.1	125.3	140.8	399.3	316.2	185.5	149.5	190.2	209.8	413.0	272.7	278.4	315.9	312.0	291.3
Petroleum (Refined)	106.8	108.9	128.7	223.4	257.6	276.6	308.2	321.0	444.8	674.7	805.8	761.2	684.3	665.1	633.1
Cartons (Corrugated)	106.0	118.6	131.9	152.6	165.6	173.1	173.6	180.3	205.2	230.7	244.2	243.9	243.6	266.9	274.7
Cans (Steel/Tin)[1]	112.0	112.4	116.6	140.9	160.1	165.9	179.1	197.5	218.6	243.5	N/A	N/A	N/A	N/A	N/A
Bottles (Returnable)	131.7	135.6	138.0	152.6	178.3	197.8	216.2	231.9	245.4	289.4	332.5	N/A	N/A	N/A	N/A
Syrup (Cola)[2]	105.8	107.6	108.2	121.0	139.4	131.4	133.9	139.1	147.4	166.7	177.7	183.3	196.9	202.8	209.4

[1]Index: December 1970 = 100
[2]Index: December 1968 = 100
NOTE: N/A = Not Available
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Producer Prices and Price Indexes: 1971-1985

TABLE 21
Cola Soft Drinks, Retail Prices by Region
Annual Averages (Cents per 72 oz. pack)
1980-1985

Region	1980		1981		1982		1983		1984		1985	
	Refillable Bottles[1]	Cans[2]	Refillable Bottles[1]	Cans[2]	Refillable Bottles[1]	Cans[2]	Refillable Bottles[1]	Cans[2]	Refillable Bottles[1]	Cans[2]	Refillable Bottles[1]	Cans[2]
Northeast	113.3	184.9	121.9	203.3	123.3	214.3	144.6	213.7	148.1	248.2	147.6	235.8
North Central	106.7	198.8	114.5	215.6	114.9	216.1	113.1	219.8	115.4	221.4	118.4	224.1
South	111.2	N/A	121.5	199.7	127.5	210.4	126.5	216.8	117.9	212.8	124.2	212.9
West	122.3	190.2	145.1	211.6	129.6	210.2	127.4	205.9	140.4	216.2	141.8	216.5
U.S. Average	111.9	189.9	123.0	208.5	121.3	212.5	122.5	213.8	124.0	219.1	124.7	221.0

[1]Non diet cola, refillable bottles, 6 or 8 pack
[2]Priced per six pack
NOTE: Regions are defined as the four census regions.
N/A = Not Available
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, News, Consumer Prices, Energy and Food

TABLE 22
Soft Drink Retail Prices—Annual Average
1970-1985

Year	Cola Refillable Container (72 oz. Pack) (Cents)	Carbonated Fruit Drink Refillable Container (72 oz. Pack) (Cents)
1985	124.5	N/A
1984	124.0	N/A
1983	122.5	N/A
1982	12[illegible].3	N/A
1981	123.0	N/A
1980	111.9	N/A
1979	N/A	N/A
1978	N/A	N/A
1977	107.4	113.8
1976	127.2	116.7
1975	132.8	115.2
1974	108.9	93.7
1973	86.1	75.5
1972	83.3	73.2
1971	75.8	72.6
1970	72.6	69.1

NOTE: N/A = Not Available
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, News: Consumer Prices, Energy and Food.

TABLE 23
Soft Drink Consumer Price Index
Index: 1967 = 100
1964-1985

Year	Annual Averages Cola Drinks 1964-1985 72 oz. pack (Excluding Diet Cola)	Annual Averages Carbonated Drinks[1] 1978-1985 72 oz. pack (Including Diet Cola)
1985	322.4	150.0
1984	317.5	150.2
1983	313.3	147.3
1982	305.6	143.8
1981	296.9	140.7
1980	269.1	128.4
1979	239.1	115.7
1978	218.3	106.8
1977	203.4	
1976	194.2	
1975	200.5	
1974	163.0	
1973	131.7	
1972	128.3	
1971	125.9	
1970	119.0	
1969	112.7	
1968	107.2	
1967	100.0	
1966	94.2	
1965	91.3	
1964	90.3	

[1]New Index: December 1977 = 100. Prior to 1978 carbonated soft drink figures were not reported.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index.

TABLE 24
Soft Drink Industrial Production
Index: 1977 = 100

Month	Production	Annual Average
1986.05	140.3	
1986.04	136.6	
1986.03	135.6	
1986.02	137.8	
1986.01	128.5	
1985.12	136.4	122.3
1985.11	136.8	
1985.10	135.5	
1985.09	140.7	
1985.08	134.1	
1985.07	133.7	
1985.06	136.4	
1985.05	138.1	
1985.04	136.0	
1985.03	133.0	
1985.02	135.2	
1985.01	137.1	
1984.12	139.1	138.5
1984.11	140.4	
1984.10	137.7	
1984.09	146.3	
1984.08	139.4	
1984.07	138.2	
1984.06	140.8	
1984.05	137.0	
1984.04	135.0	
1984.03	135.4	
1984.02	138.4	
1984.01	134.3	
1983.12	134.2	135.0
1983.11	137.7	
1983.10	137.9	
1983.09	137.9	
1983.08	143.9	
1983.07	140.1	
1983.06	136.6	
1983.05	133.7	
1983.04	131.7	
1983.03	128.2	
1983.02	129.2	
1983.01	129.3	
1982.12	127.8	125.3
1982.11	126.5	
1982.10	124.2	
1982.09	122.8	
1982.08	124.7	
1982.07	123.0	
1982.06	125.0	
1982.05	124.3	
1982.04	126.5	
1982.03	128.4	
1982.02	125.8	
1982.01	124.6	
1981.12	125.1	122.3

NOTE: Data is seasonally adjusted.
SOURCE: Board of Governors of the Federal Reserve System, Federal Reserve Statistical Release, 1986.

Section V

Soft Drink Industry Employment, Wages and Ownerships

The soft drink industry has increased output of 288-ounce cases from 3.24 billion cases in 1977 to 4.83 billion cases in 1985. This reflects an increase of 49% from 1977 to 1985. The total number of employees decreased 4.1% in the same period, while the number of production workers decreased 13.8%. Accordingly, production worker manhours declined 12.5%, while average weekly wages have increased more than 80%. In 1985, there were 58.8 cases of soft drinks produced per production employee per hour. This shows a 70.4% increase over the 1977 level of 34.5 cases.

Productivity of workers in the soft drink industry steadily increased between 1977 and 1985. Output per employee-hour for all employees rose by 45.0% and for production workers it rose 60.0%. Output per employee increased 46.0% during the 1977-1985 period.

According to the Department of Commerce, in 1986 approximately 91% of soft drink establishments were franchisee-owned, while the other 9% were owned by the franchising companies. Soft drink sales by franchisee-owned establishments made up 92% of the total in 1986 as opposed to 96% in 1972. Average annual soft drink sales by company-owned establishments were $13,565,217 per establishment in 1986, while franchisee-owned establishments averaged $15,139,241.

TABLE 25
Soft Drink Industry Indexes of Output per Employee-Hour and Output per Employee
Index: 1977 = 100
1965-1985

	Output Per Employee-Hour			Output Per Employee		
Year	All Employees	Production Workers	Nonproduction Workers	All Employees	Production Workers	Nonproduction Workers
1985	144.9	159.8	137.6	145.5	161.8	137.6
1984	138.3	154.2	130.8	138.3	154.5	130.8
1983	127.0	142.4	119.7	127.1	142.9	119.7
1982	118.3	131.5	112.0	118.5	131.8	112.0
1981	114.3	125.1	109.0	114.7	126.0	109.0
1980	109.8	116.4	106.4	110.5	118.4	106.4
1979	105.6	109.1	103.6	105.9	110.2	103.6
1978	104.5	105.3	104.1	105.0	106.3	104.0
1977	100.0	100.0	100.0	100.0	100.0	100.0
1976	94.2	93.5	94.6	94.3	93.5	94.8
1975	87.2	86.1	87.7	87.1	85.2	88.1
1974	80.2	78.5	81.2	80.3	77.9	81.8
1973	78.3	76.7	79.3	78.7	77.1	79.6
1972	75.4	72.9	76.9	75.7	73.7	76.8
1971	73.9	69.7	76.4	73.2	70.6	74.8
1970	70.0	65.5	72.9	68.6	66.2	70.0
1969	69.7	64.0	73.5	67.7	64.6	69.5
1968	72.1	64.3	77.5	69.6	65.6	72.1
1967	66.6	58.5	72.2	64.8	61.1	67.1
1966	68.2	59.4	74.5	66.9	63.1	69.3
1965	67.8	60.9	72.5	66.3	64.5	67.4

NOTE: Because of periodic revisions in source data, the measures in this table may differ from those previously published.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Productivity Measures for Selected Industries.

TABLE 26
Soft Drink Industry Indexes of Employee-Hours and Employment
Index: 1977 = 100
1965-1985

		Employee Hours			Employment		
Year	Output	All Employees	Production Workers	Nonproduction Workers	All Employees	Production Workers	Nonproduction Workers
1985	139.5	96.3	87.3	101.4	95.9	86.2	101.4
1984	133.5	96.5	86.6	102.1	96.5	86.4	102.1
1983	124.6	98.1	87.5	104.1	98.0	87.2	104.1
1982	119.4	100.9	90.8	106.6	100.8	90.6	106.6
1981	117.3	102.6	93.8	107.6	102.3	93.1	107.6
1980	115.2	104.9	99.0	108.3	104.3	97.3	108.3
1979	111.6	105.7	102.3	107.7	105.4	101.3	107.7
1978	108.1	103.4	102.7	103.8	103.0	101.7	103.8
1977	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1976	91.7	97.3	98.1	96.9	97.2	98.1	96.7
1975	80.8	92.7	93.8	92.1	92.8	94.8	91.7
1974	77.1	96.1	98.2	94.9	96.0	99.0	94.3
1973	76.5	97.7	99.7	96.5	97.2	99.2	96.1
1972	72.7	96.4	99.7	94.5	96.1	98.7	94.6
1971	71.3	96.5	102.3	93.3	97.4	101.0	95.3
1970	67.7	96.7	103.3	92.9	98.7	102.3	96.7
1969	67.2	96.4	105.0	91.4	99.3	104.0	96.7
1968	67.6	93.7	105.2	87.2	97.1	103.1	93.7
1967	62.7	94.2	107.2	86.9	96.8	102.7	93.4
1966	63.1	92.5	106.3	84.7	94.3	100.0	91.0
1965	59.2	87.3	97.2	81.7	89.3	91.8	87.8

NOTE: Because of periodic revisions in source data, the measures in this table may differ from those previously published.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Productivity Measures for Selected Industries.

TABLE 27
Soft Drink Industry Employment and Earnings
1965-1985

Year	Total Employees (Thous.)	Production Workers (Thous.)	Production Workers: Average Weekly Wage $	Production Workers: Average Hourly Earnings $	Production Workers: Average Hours Worked Per Week	Production Workers: Average Weekly Overtime Hours
1985	127.1	41.2	$346.33	$8.68	39.9	3.4
1984	127.8	41.3	326.27	8.26	39.5	3.1
1983	129.9	41.7	310.47	7.16	39.5	3.0
1982	133.6	43.3	287.56	7.28	39.5	3.2
1981	135.6	44.5	265.99	6.70	39.7	3.5
1980	138.2	46.5	245.01	6.11	40.1	3.7
1979	139.6	48.4	220.49	5.54	39.8	3.5
1978	136.5	48.6	207.76	5.22	39.8	3.9
1977	132.5	47.8	191.09	4.85	39.4	3.8
1976	128.8	46.9	176.91	4.49	39.4	
1975	123.0	45.3	158.73	4.07	39.0	
1974	127.2	47.3	145.06	3.71	39.1	
1973	128.8	47.4	134.64	3.40	39.6	
1972	127.3	47.2	126.56	3.18	39.8	
1971	129.0	48.3	118.50	2.97	39.9	
1970	130.8	48.9	110.25	2.77	39.8	
1969	131.6	49.7	103.88	2.61	39.8	
1968	128.7	49.3	98.49	2.45	40.2	
1967	128.2	49.1	93.30	2.27	41.1	
1966	124.9	47.8	90.50	2.16	41.9	
1965	118.3	43.9	84.65	2.03	41.7	

NOTE: Because of periodic revisions in source data, the measures in this table may differ from those previously published.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Employment and Earnings, 1977-1985; U.S. Industrial Outlook.

TABLE 28
Productivity Measures in the Soft Drink Bottling and Canning Industry
(Units in thousands)
1965-1985

Year	Output (288-ounce cases)	Production Worker Man-Hours	Output Per Man Hour (cases)
1985	4,836,730	82,194	58.8
1984	4,613,380	81,568	56.6
1983	4,274,274	82,358	51.9
1982	4,065,815	85,518	47.5
1981	3,959,697	88,333	44.8
1980	3,816,575	93,233	40.9
1979	3,664,500	96,316	38.0
1978	3,490,000	96,714	36.1
1977	3,247,722	94,166	34.5
1976	2,952,474	92,393	32.0
1975	2,610,500	88,335	29.6
1974	2,532,007	92,472	27.4
1973	2,514,407	93,852	26.8
1972	2,360,944	93,928	25.1
1971	2,235,743	96,359	23.2
1970	2,064,423	97,311	21.2
1969	1,942,073	98,903	19.6
1968	1,851,357	99,093	18.7
1967	1,646,968	100,901	16.3
1966	1,568,391	100,141	15.7
1965	1,402,855	91,532	15.3

NOTE: Because of periodic revisions in source data, the measures in this table may differ from those previously published.
SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, Employment and Earnings, 1977-1985 and National Soft Drink Sales Surveys of the Soft Drink Industry, 1965-1985.

TABLE 29
Soft Drink Industry Franchising
1972-1986

Item	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985[1]	1986[1]
Total number of establishments:	2,750	2,680	2,450	2,398	2,246	2,146	2,096	1,950	1,850	1,750	1,661	1,568	1,518	1,391	1,300
Company-owned	100	100	85	85	76	70	70	75	75	75	75	85	95	105	115
Franchisee-owned	2,650	2,580	2,365	2,313	2,170	2,076	2,026	1,875	1,775	1,675	1,586	1,483	1,423	1,286	1,185
Total Sales of products and services: (Mil. $)	$5,378	$5,698	$6,305	$8,165	$8,429	$9,577	$10,887	$12,194	$14,352	$14,674	$15,101	$16,200	$16,700	$18,100	$19,500
Company-owned	199	211	233	302	287	326	762	853	1,005	1,027	1,057	1,296	1,336	1,448	1,560
Franchisee-owned	5,179	5,487	6,072	7,865	8,142	9,251	10,125	11,341	13,347	13,647	14,044	14,904	15,364	16,652	17,940

[1]Data Estimated by Respondents
SOURCE: U.S. Department of Commerce, Bureau of Industrial Economics, Franchising in the Economy, 1980-1985 and 1984-1986. Includes soft drinks, fruit drinks and ades, syrups, flavoring agents and bases. Data does not include figures for independent private label and contract-biller bottling companies which accounted for 22 percent of the value of shipments of the total industry.

TABLE 30
Soft Drink Industry Franchising
Average Sales Per Establishment
(Thousands of dollars)
1979-1986

	1979	1980	1981	1982	1983	1984	1985[1]	1986[1]
Total	$6,253	$7,758	$8,354	$9,092	$10,332	$11,001	$13,012	$15,000
Company-owned	11,373	13,400	13,640	14,093	15,247	14,063	13,790	13,565
Franchisee-owned	6,049	7,519	8,118	8,855	10,050	10,797	12,949	15,139

[1]Data estimated by respondents.
SOURCE: U.S. Department of Commerce, Bureau of Industrial Economics, Franchising in the Economy, 1980-1985 and 1984-1986. Includes soft drinks, fruit drinks, and ades, syrups flavoring agents and bases. Data does not include figures for independent private label and contract-biller bottling companies, which accounted for 22 percent of the value of shipments of the total industry.

TABLE 31
Average Wholesale Non-discounted Price Per Packaged Case[1]
1983-1985

	1983	1984	1985
Northeast	$6.75	$7.05	$7.22
East Central	6.33	6.36	6.41
West Central	6.65	6.82	7.12
South	7.09	6.86	7.04
Southwest	7.41	7.37	7.51
West	7.37	7.42	7.64
Pacific	7.14	6.69	7.63
National Average	$6.72	$6.87	$7.03

[1]Case = 288 ounce equivalents
SOURCE: Beverage Marketing U.S. Soft Drink Market & Packaging Report, 1986.

TABLE 32
Average Wholesale Non-Discounted Bulk Price Per 5 Gallon Transfer Tank
1983-1985

	1983	1984	1985
Northeast	$23.50	$21.05	$21.09
East Central	23.18	23.45	24.04
West Central	22.58	23.40	23.54
South	22.91	24.10	24.09
Southwest	24.40	23.30	23.77
West	20.17	24.10	24.53
Pacific	20.80	21.60	21.88
National Average	$22.30	$23.10	$23.35

SOURCE: Beverage Marketing U.S. Soft Drink Market & Packaging Report, 1986.

Section VI

Soft Drink Industry Financial Information

According to the 1983 "tax basis" data obtained from the Internal Revenue Service, soft drink manufacturers reported pre-tax profit margins of 4.1% and after-tax margins of 3.2%. These figures are based on 1,522 tax returns of companies whose primary business is soft drinks. Relating 1979 profit margin figures with those for 1983, pre-tax profit margins were down to 6.4% as compared to 7.5% for 1979. Even with a decline in pre-tax margins, post-tax profit margins increased from 3.4% in 1979 to 5.9% in 1983. Product sales for companies reporting income represented 96.2% of total income with interest, rent, royalties and dividends accounting for the majority of the remainder. These percentages are close to the 97.6 figure reported for 1979. Cost of goods sold represented 54.9% of total receipts in 1983 compared to 62.9% in 1979. Advertising and depreciation were the other two largest expenses, accounting for an additional 9.7% of total receipts.

Balance sheet information, for all returns, indicates that cash represented 4.7% of total assets in 1983; notes and account receivables were 27.5%; inventories were 9.9% and gross capital assets, less reserves, were 25.3%. The structure of the liabilities of soft drink manufacturers changed significantly between 1979 and 1983. Account payables were 20.9% of total debt in 1983, up from 14.0% in 1979. Short-term debt and current liabilities decreased from 17.1% of total debt to 13.8% in 1983. Debt maturing after one year represented 18.8% of the total compared with 11.3% in 1979. Equity decreased during the five-year period to 41.7% of the total in 1983, compared to 55.8% in 1979.

A "financial books" basis survey, made by Robert T. Shircliff and Associates, Inc., indicates cost of goods sold was 61.4% of total sales in 1984. Selling expense constituted the major portion of operating expenses followed by administrative expense, delivery expense and advertising expense. Pre-tax profit was reported as 8.9% of sales during 1984 and post-tax profit was 5.2%.

TABLE 33
Soft Drink Manufacturers, Financial Data (Tax Basis)
Income Statement, 1982

	All Returns		Returns With Net Income	
Income Statement Categories	(Thous. $)	% of Receipts	(Thous. $)	% of Receipts
Net Sales	$25,204,947	95.2%	$16,604,002	96.0%
Interest, Rent Royalties	670,791	2.5	262,360	1.5
Dividends Received	187,094	0.7	177,183	1.0
Other Receipts	350,832	1.3	196,122	1.1
Net Gain on Sales of Assets	81,253	0.3	61,904	0.4
Total Receipts	26,494,917	100.0	17,301,571	100.0
Cost of Goods Sold	14,179,750	53.5	9,518,317	55.0
Compensation of Officers	211,580	0.8	177,696	1.0
Rents Paid on Business Property	250,019	0.9	98,338	0.6
Repairs	250,335	0.9	164,415	1.0
Bad Debts	39,141	0.1	19,151	0.1
Interest Paid	855,461	3.2	331,718	1.9
Contributions or Gifts	14,183	0.1	14,183	0.1
Depreciation, Depletion and Amortization	1,197,621	4.5	570,210	3.3
Advertising	1,792,930	6.8	1,076,388	6.2
Contributions Under Pension Plans, etc.	400,592	1.5	234,860	1.4
Loss (Net) on Sales of Other Than Capital Assets	8,071	0.0	1,895	0.0
Taxes Other Than Federal Income Taxes	579,982	2.2	354,834	2.1
Other Deductions	5,538,407	20.9	3,458,540	20.0
Total Deductions	25,318,072	95.6	16,020,545	92.6
Net Profit (or loss) Before Federal Income Taxes	1,176,845	4.4	1,281,026	7.4
Net Profit (or loss) After Federal Income Taxes and Tax Credits	915,770	3.5	1,022,512	5.9
Number of Returns:	1,156		1,032	

SOURCE: Internal Revenue Service, Source Book of Statistics of Income, 1982

TABLE 33-A
Soft Drink Manufacturers, Financial Data (Tax Basis)
Income Statement, 1983

	All Returns		Returns With Net Income	
Income Statement Categories	(Thous. $)	% of Sales	(Thous. $)	% of Sales
Net Sales	$27,413,231	95.3%	$17,429,611	96.1%
Interest, Rent, Royalties	709,693	2.5	265,553	1.5
Dividends Received	202,790	0.7	200,267	1.1
Other Receipts	384,903	1.3	188,413	1.0
Net Gain on Sales of Assets	54,719	0.2	48,059	0.3
Total Receipts	28,765,337	100.0	18,131,902	100.0
Cost of Goods Sold	15,402,589	53.5	9,962,368	54.9
Compensation of Officers	238,785	0.8	189,273	1.0
Rents Paid on Business Property	265,725	0.9	96,644	0.5
Repairs	260,151	0.9	159,550	0.9
Bad Debts	126,149	0.4	19,799	0.1
Interest Paid	919,116	3.2	364,838	2.0
Contributions or Gifts	15,272	0.1	15,117	0.1
Depreciations, Depletion and Amortization	1,376,265	4.8	626,293	3.5
Advertising	1,995,839	6.9	1,117,369	6.2
Contributions Under Pension Plans, etc.	418,983	1.5	222,142	1.2
Loss (Net) on Sales of Other Than Capital Assets	8,385	—	5,543	—
Taxes Other Than Federal Income Taxes	615,247	2.1	353,702	2.0
Other Deductions	5,935,645	20.6	3,567,728	19.7
Total Deductions	27,578,151	95.9	16,700,366	92.1
Net Profit (or loss) Before Federal Income Taxes	1,187,186	4.1	1,431,535	7.9
Net Profit (or loss) After Federal Income Taxes and Tax Credits	907,652	3.2	1,154,796	6.4
Number of Returns	1,522		1,144	

SOURCE: Internal Revenue Service, Source Book of Statistics of Income, 1983

TABLE 34
Soft Drink Manufacturers, Financial Data
Balance Sheet, 1982

	All Returns		Returns With Net Income	
	(Thous. $)	% of Assets Liabilities	(Thous. $)	% of Assets Liabilities
ASSETS				
Cash	$714,208	3.8%	$627,109	5.5%
Notes & Accts Receivable (Less Reserve for Bad Debts)	4,531,883	24.2	1,723,225	15.1
Inventories	1,937,006	10.3	1,487,346	13.0
Investments in Government Obligations	45,803	0.2	44,450	0.4
Other Investments	3,907,829	20.9	2,716,744	23.9
Gross Capital Assets (Less Reserves)	5,127,337	27.4	3,181,571	28.0
Land	404,630	2.2	212,938	1.9
Other Assets	2,048,884	11.0	1,389,294	12.2
TOTAL ASSETS	18,717,580	100.0	11,382,677	100.0
LIABILITIES & OWNER'S EQUITY				
Accounts Payable (Less than 1 year)	$3,178,755	17.0%	$787,154	6.9%
Current Maturities (Less than 1 year)	830,792	4.4	561,502	4.9
Other Current Liabilities	1,689,590	9.0	1,062,281	9.3
Loans from Stockholders	173,864	9.0	153,744	1.4
Current Maturities (More than 1 year)	3,549,736	19.0	1,776,235	15.6
Other Liabilities	654,694	3.5	586,625	5.2
Capital Stock, Capital Surplus, Retained Earnings	8,640,149	46.2	6,455,137	56.7
TOTAL LIABILITIES & OWNER'S EQUITY	18,717,580	100.0	11,382,677	100.0
Number of Returns	1,156		1,032	

NOTE: All figures stated on a tax-books basis.
SOURCE: Internal Revenue Service, Source Book of Statistics of Income, 1982.

TABLE 34-A
Soft Drink Manufacturers, Financial Data
Balance Sheet, 1983

	All Returns		Returns With Net Income	
	(Thous. $)	% of Assets Liabilities	(Thous. $)	% of Assets Liabilities
ASSETS				
Cash	$1,060,634	4.7%	$892,948	7.0%
Notes & Accts Receivable (Less Reserve for Bad Debts)	6,137,240	27.5	1,911,729	14.9
Inventories	2,212,669	9.9	1,707,239	13.3
Investments and Government Obligations	72,848	0.3	68,827	0.5
Other Investments	4,264,386	19.1	3,150,721	24.5
Gross Capital Assets (Less Reserves)	5,663,287	25.3	3,255,818	25.4
Land	437,511	2.0	202,894	1.6
Other Assets	2,496,246	11.2	1,647,979	12.8
TOTAL ASSETS	22,344,822	100.0	12,838,154	100.0
LIABILITIES & OWNER'S EQUITY				
Accounts Payable (Less than 1 year)	4,665,900	20.9	1,057,370	8.2
Current Maturities (Less than 1 year)	824,646	3.7	422,032	3.3
Other Current Liabilities	2,253,725	10.1	1,368,264	10.7
Loans From Stockholders	184,941	0.8	172,190	1.3
Current Maturities (More than 1 year)	4,198,575	18.8	2,159,215	16.8
Other Liabilities	894,602	4.0	853,637	6.6
Capital Stock, Capital Surplus, Retained Earnings	9,322,404	41.7	6,805,448	53.0
TOTAL LIABILITIES & OWNER'S EQUITY	22,344,822	100.0	12,838,154	100.0
Number of Returns	1,522		1,144	

NOTE: All figures stated on a tax-books basis.
SOURCE: Internal Revenue Service, Source Book of Statistics of Income, 1983.

TABLE 35
Soft Drink Industry Income Statement Survey
Comparative Income, Expense and Profit Averages[1]

Classification	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984
Sales Income[2]	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Cost of Sales	66.6	64.0	63.1	62.9	62.5	63.8	63.2	64.7	63.9	62.0	61.4
Gross Profit	33.4	36.0	36.9	37.1	37.5	36.2	36.8	35.3	36.1	38.0	38.6
Administrative Expense	8.3	8.9	7.4	7.3	7.6	8.3	7.2	8.3	9.8	11.2	9.6
Selling Expense	10.3	9.9	10.5	9.9	9.5	9.8	12.1	11.4	11.6	10.9	12.6
Advertising Expense	3.4	3.2	4.3	4.0	4.6	4.5	4.9	2.7	2.4	2.7	1.8
Delivery Expense	6.2	3.9	3.6	4.7	4.4	3.7	4.8	4.5	4.7	4.9	6.9
Operating Expense	28.2	25.9	25.8	25.9	26.1	26.3	29.0	26.9	28.5	29.7	30.9
Operating Income	5.2	10.1	11.1	11.2	11.4	9.9	7.8	8.4	7.6	8.3	7.7
Other Income	0.1	0.4	0.8	0.5	0.6	0.9	1.5	0.8	1.3	1.5	1.2
Profit (Before Tax)	5.3	10.5	11.9	11.7	12.0	10.8	9.3	9.2	8.9	9.8	8.9
Income Tax	-2.3	-4.7	-5.5	-5.6	-5.6	-4.8	-4.1	-4.0	-3.7	-4.0	-3.7
Profit (After Tax)	3.0	5.8	6.4	6.1	6.4	6.0	5.2	5.2	5.2	5.8	5.2
Average Revenue per Case[3]	$3.36	$3.81	$4.18	$4.56	$4.85	$5.74	$6.33	$6.76	$6.46	$7.13	$7.01

[1]The "averages" were developed from the most recently reviewed financials received from across the country without regard to location, packaging preferences, form of ownership or accounting methods.
[2]Sales income is "net" of promotional discounts. Discounts in 1984 averaged 10.6% of net revenues and 74 cents per case sold.
[3]Represents average per case income after deducting promotional allowances and sales discounts.
SOURCE: Robert T. Shirclift and Associates, Inc.

Section VII

Comparative Beverage Trends

According to the *Impact Beverage Trends in America Review and Forecast*, total beverage consumption, not including water and liquids in foods, totalled 45.6 billion gallons in 1985. This represented an increase of 40.3% in beverage consumption from the 32.5 billion gallons consumed in 1960.

As a result of a change in consumer preferences over the past few years, soft drinks surpassed water as the most consumed beverage on a volume basis. Soft drink consumption reached an estimated 12,125 million gallons in 1985, which represented 26.6% of all beverages consumed. Water accounted for 11,200 million gallons in 1985 which represented 24.6% of the total beverage market.

Per capita consumption of all beverages rose to 191.4 gallons in 1985 as compared with 180.4 gallons in 1960, for an increase of 6.1%. Soft drink consumption of 50.9 gallons per capita in 1985 was up from 16.9 gallons per capita in 1960, or a 4.5% compound annual increase. Beer per capita consumption rose from 15.2 gallons in 1960 to 24.0 in 1981 or a 1.9% compound annual increase. Per capita beer consumption has, however, fallen since it peaked at 24.6 gallons in 1981. Wine grew at a compound rate of 4.0% annually from .91 gallons per capita in 1960 to 2.45 gallons per capita in 1985. Total juices rose from 6.1 in 1960 to 9.9 gallons per capita in 1985 for a compound annual increase of 2.0%.

According to *Beverage Industry*, which bases its figures on a "share of stomach" approach where liquid consumption is set at 182.5 gallons annually, soft drink consumption went up from 18.8 gallons per capita in 1965 to 44.5 gallons per capita in 1985. This represents a compound annual increase of 4.4%. Per capita beer consumption increased 2.8% compounded annually between 1965 and 1981. Per capita beer consumption fell off after 1981 as was represented by the IMPACT data. Per capita juice consumption increased 2.6% compounded annually between 1965 and 1985. Wine consumption grew from 1.0 gallons per capita in 1965 to 2.4 gallons per capita in 1985, a compound annual increase of 4.5%.

Carbonated beverages have always been the preferred form of soft drinks consumed. In 1985, 88.7% or 10.8 billion of the 12.1 billion gallons of soft drink consumption was in a carbonated form. Conversely, 11.3% or 1.4 billion gallons were in a powdered form. Per capita consumption of carbonated soft drinks grew annually at 5.3% between 1960 and 1985. Powdered soft drink per capita consumption grew at 0.9% during the same period.

During 1985, per capita expenditures for beverages were $122.10 of which $53.30 was spent on alcoholic beverages and $68.70 was spent on non-alcoholic beverages. On a per gallon basis, distilled spirits were the most expensive beverage purchased at $37.60 per gallon whereas tea and water were the least expensive at $.80 per gallon each.

Nationwide, total beverage consumption has been highest in the South. Although only 31.9% of the country's residents live in the Southern region, they drink 33.2% of the total beverages consumed. In addition, of type of beverage consumed, a higher percentage (68.4%) of Southerners drink regular cola soft drinks than residents in any other region.

In comparison, the beverage that seems to be consumed the least nationwide is canned tea. It is consumed by only 16.2% of the adults in the Northeast region, by 11.4% in the North Central region, by 15.0% in the South region and by 11.7% in the West region.

According to the *1986 Nielsen Review of Retail Food Store Trends*, in grocery stores during 1985, soft drinks on average were placed on 251 linear feet of shelf space. This footage allocation has increased from the 221 linear feet allocated during 1981.

TABLE 36
U.S. Beverage Consumption 1960-1985
(Millions of gallons)

Category/Type	1960	1970	1975	1980	1981	1982	1983	1984	1985	Average Annual Compound Growth Rate 1960 1970	1970 1975	1975 1980	1980 1985	Percent Change 1980 1981	1981 1982	1982 1983	1983 1984	1984 1985
Alcoholic Beverages																		
Beer	2,737	3,807	4,659	5,515	5,639	5,651	5,698	5,666	5,674	3.3%	4.1%	3.4%	0.6%	2.2%	0.3%	0.8%	-0.6%	0.2%
Wine	164	267	368	479	505	514	528	552	584	5.0	6.6	5.4	4.0	5.6	1.8	2.7	4.6	4.7
Distilled Spirits	240	388	446	452	456	444	440	434[4]	426	4.9	2.8	0.3	-1.2	0.9	-2.7	-1.0	-1.4	-2.7
Total Alcoholic Beverages	3,141	4,462	5,473	6,446	6,600	6,609	6,666	6,652	6,684	3.6%	4.2%	3.3%	0.7%	2.4%	0.1%	0.9%	-0.2%	0.4%
Non-Alcoholic Beverages																		
Soft Drinks[1]	3,040	5,560	6,894	9,817	10,139	10,383	10,987	11,515	12,125	6.2%	4.4%	7.3%	4.3%	3.3%	2.4%	5.8%	4.8%	4.4%
Coffee	6,475	6,800	6,280	6,100	6,200	6,140	6,140	6,080	6,080	0.5	-1.6	-0.6	-0.1	1.6	-1.0	0.0	-1.0	0.0
Milk	4,625	5,455	5,310	4,944	4,894	4,861	4,958	5,023	5,053	1.7	-0.6	-1.4	0.4	-1.0	-0.7	2.0	1.3	1.4
Fruit Juice/ Drinks	1,100	1,470	1,820	2,196	2,204	2,211	2,349	2,481	2,356	2.9	4.4	3.8	1.4	0.4	0.3	6.2	5.6	-0.8
Tea	1,005	1,160	1,365	1,600	1,625	1,600	1,650	1,600	1,550	1.4	3.3	3.2	-0.6	1.6	-1.5	3.1	-3.0	-3.1
Water[2]	12,802	11,890	11,384	11,251	11,224	11,222	11,219	11,215	11,200	-0.7	-0.9	-0.2	-0.1	-0.2	0.0	0.0	0.0	-0.1
Other[3]	285	340	450	520	525	530	535	535	535	1.8	5.8	2.9	0.6	1.0	1.0	0.9	0.0	0.0
Total Non-Alcoholic Beverages	29,332	32,675	33,503	36,428	36,811	36,947	37,838	38,449	38,899	1.1%	0.5%	1.7%	1.3%	1.1%	0.4%	2.4%	1.6%	1.3%
Total Beverage Consumption	32,473	37,137	38,976	42,874	43,411	43,556	44,504	45,101	45,583	1.4%	1.0%	1.9%	1.2%	1.3%	0.3%	2.2%	1.3%	1.2%

[1]Carbonated and powdered soft drinks.
[2]Tap and bottled water.
[3]Includes powdered breakfast beverages, non-alcoholic cocktail mixes, chocolate flavorable beverages, milk and water additives, herbal tea and instant juices.
[4]Estimated.
SOURCE: The Impact Beverage Trends to America Review and Forecast, New York, N.Y.

TABLE 37
U.S. Per Capita Beverage Consumption 1960-1985
(Gallons per person)

Category/Type	1960	1970	1975	1980	1981	1982	1983	1984	1985	Average Annual Compound Growth Rate 1960 1970	1970 1975	1975 1980	1980 1985	Percent Change 1980 1981	1981 1982	1982 1983	1983 1984	1984 1985
Alcoholic Beverages																		
Beer	15.21	18.66	21.62	24.28	24.57	24.38	24.35	24.00	23.83	2.1%	3.0%	2.3%	-0.4%	1.2%	-1.8%	-0.1%	-1.4%	-0.7%
Wine	0.91	1.31	1.71	2.11	2.20	2.22	2.26	2.34	2.45	3.7	5.5	4.3	3.1	4.3	0.9	1.8	3.5	3.7
Distilled Spirits	1.33	1.90	2.07	1.99	1.99	1.92	1.88	1.84[4]	1.79	3.6	1.7	-0.8	-2.1	0.0	-3.5	-2.1	-2.1	-3.6
Total Alcoholic Beverages[1]	17.45	21.87	25.40	28.37	28.76	28.51	28.49	28.17	28.07	2.3%	3.0%	2.2%	-0.2%	1.4%	-0.9%	-0.1%	-1.1%	-0.6%
Non-Alcoholic Beverages																		
Soft Drinks	16.89	27.25	31.99	43.21	44.18	44.79	46.95	48.77	50.92	4.9%	3.3%	6.2%	3.3%	2.2%	1.4%	4.8%	3.9%	3.5%
Coffee	35.97	33.33	29.14	26.85	27.02	26.49	26.24	25.75	25.54	-0.8	-2.7	-1.6	-1.0	0.6	-2.0	-1.0	-1.9	-0.9
Milk	25.69	26.74	24.64	21.76	21.32	20.97	21.19	21.27	21.22	0.4	-1.6	-2.5	-0.5	-2.0	-1.6	1.1	0.4	0.5
Fruit Juice/ Drinks	6.11	7.21	8.45	9.66	9.60	9.54	10.04	10.51	9.90	1.7	3.2	2.7	0.5	-0.6	-0.6	5.2	4.7	-1.8
Tea	5.58	5.69	6.33	7.04	7.08	6.90	7.05	6.78	6.51	0.2	2.2	2.2	1.6	0.6	-2.5	2.2	-3.8	-4.0
Water	71.12	58.28	52.83	49.52	48.91	48.41	47.94	47.50	47.04	2.0	-2.0	-1.3	-1.0	-1.2	-1.0	-1.0	-0.9	-1.1
Other	1.58	1.67	2.09	2.29	2.29	2.29	2.29	2.27	2.25	0.6	4.6	1.8	-0.4	0.0	0.0	0.0	-0.9	-0.9
Total Non-Alcoholic Beverages[2]	162.96	160.17	155.47	160.33	160.40	159.39	161.70	162.85	164.47	-0.2%	0.6%	0.6%	0.4%	0.0%	-0.6%	1.5%	0.7%	0.4%
Total Beverage Consumption[3]	180.41	182.04	180.86	188.71	189.15	187.90	190.19	191.02	191.44	0.1%	-0.1%	0.9%	0.2%	0.2%	-0.7%	1.2%	0.4%	0.2%

[1]Millions of gallons may not agree because of rounding.
[2]Estimated.
SOURCE: The Impact Beverage Trends to America Review and Forecast, New York, N.Y.

TABLE 38
U.S. Liquid Consumption Trends
(Gallons per capita)

	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985
Soft Drinks[1]	18.8	20.7	21.7	23.3	23.4	24.8	26.1	27.6	29.0	28.8	28.6	31.2	33.5	34.9	36.2	37.6	38.3	38.8	40.3	42.4	44.5
Coffee[2]	37.8	37.4	37.0	37.0	36.2	35.7	35.3	35.2	35.1	33.8	33.0	29.4	28.0	27.0	29.2	28.7	28.5	27.8	27.0	27.3	26.3
Beer	15.9	16.5	16.8	17.3	17.8	18.5	19.2	19.7	20.5	21.3	21.6	21.8	22.5	23.1	23.8	24.5	24.7	24.4	24.3	24.0	23.8
Milk[3]	26.0	25.9	25.3	25.6	25.3	23.1	23.0	23.1	22.7	22.0	22.1	21.9	21.5	21.3	21.0	20.7	20.4	20.0	20.9	20.0	20.1
Juices	3.8	4.0	4.8	4.7	4.8	5.2	5.7	6.0	5.2	6.1	6.8	6.8	6.8	6.5	6.7	6.9	6.7	6.8	7.7	6.6	6.4
Tea	6.3	6.3	6.4	6.6	6.6	6.5	6.7	6.8	7.2	7.3	7.3	7.4	7.7	7.7	7.6	7.3	7.5	7.5	7.2	7.3	7.0
Powdered Drink	—	—	—	—	—	—	—	—	—	—	4.8	5.5	5.9	6.1	6.0	6.0	6.0	6.0	6.5	6.4	6.0
Wine	1.0	1.0	1.0	1.1	1.2	1.3	1.5	1.6	1.7	1.7	1.7	1.7	1.8	2.1	2.2	2.3	2.3	2.3	2.4	2.3	2.4
Bottled Water	—	—	—	—	—	—	1.1	—	—	—	1.2	1.2	1.3	1.4	1.5	1.6	1.9	2.2	2.7	4.6	5.2
Distilled Spirits	1.5	1.6	1.6	1.7	1.8	1.8	1.9	1.9	1.9	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	1.9	1.8	1.8	1.7
Subtotal	111.1	113.4	114.6	117.3	117.1	116.9	119.4	121.9	123.3	123.0	129.1	129.2	131.3	132.7	137.0	138.5	139.5	139.0	141.1	142.7	143.4
Imputed Water Consumption[4]	71.4	69.1	67.9	65.2	65.4	65.6	63.1	60.6	59.2	59.5	53.4	53.3	51.2	49.8	45.5	44.0	43.0	43.5	41.4	39.8	39.1
Total	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5	182.5

[1]Per capita consumption has been revised for all years.
[2]Coffee and tea data are based on a three-year moving average to counterbalance inventory swings, thereby portraying consumption more realistically. Tea numbers have been restated to reflect this.
[3]Certain milk figures have been changed based on revisions in U.S. Department of Agriculture data.
[4]Includes all others.
NOTE: R = Revised
N/A = Not Available
SOURCE: Beverage Industry, February 1986. Copyright by John C. Maxwell.

TABLE 39
Soft Drink Consumption By Type 1960-1985
(Millions of gallons)

										Average Annual Compound Growth Rate				Percent Change				
Type	1960	1970	1975	1980	1981	1982	1983	1984	1985	1960 1970	1970 1975	1975 1980	1980 1985	1980 1981	1981 1982	1982 1983	1983 1984	1984 1985
Carbonated	2,215	4,645	5,874	8,587	8,909	9,148	9,617	10,100	10,755	7.7%	4.8%	7.9%	4.6%	3.8%	2.7%	5.1%	5.0%	5.5%
Powdered	825	915	1,020	1,230	1,230	1,235	1,370	1,415	1,470	1.0%	2.2%	3.8%	2.2%	0.0%	0.4%	10.9%	3.3%	3.2%
Total	3,040	5,560	6,894	9,817	10,139	10,383	10,987	11,515	12,125	6.2%	4.4%	7.3%	4.3%	3.3%	2.4%	5.8%	4.8%	4.4%

SOURCE: The Impact Beverage Trends in America Review and Forecast. New York, N.Y.

TABLE 40
Per Capita Soft Drink Consumption By Type, 1960-1985
(Gallons per person)

										Average Annual Compound Growth Rate				Percent Change				
Type	1960	1970	1975	1980	1981	1982	1983	1984	1985	1960 1970	1970 1975	1975 1980	1980 1985	1980 1981	1981 1982	1982 1983	1983 1984	1984 1985
Carbonated	12.31	22.77	27.26	37.79	38.82	39.47	41.10	42.78	45.17	6.3%	3.7%	6.8%	3.6%	2.7%	1.7%	4.1%	4.1%	4.5%
Powdered	4.58	4.49	4.73	5.41	5.36	5.33	5.85	5.99	5.75	-0.2%	1.0%	2.7%	1.2%	-0.9%	-0.6%	9.8%	2.4%	-4.1%
Total[1]	16.89	27.25	31.99	43.21	44.18	44.79	46.95	48.77	50.92	4.9%	3.3%	6.2%	3.4%	2.2%	1.4%	4.8%	3.9%	3.5%

[1]Addition of columns may not agree because of rounding.
SOURCE: The Impact Beverage Trends in America Review and Forecast. New York, N.Y.

TABLE 41
Beverage Consumption Buying Power Survey 1970-1985
Consumer Expenditures By Beverage Type[1]
(Billions of dollars)

Category/Type	1970	1975	1980	1983	1984	1985	Average Annual Compound Growth Rate 1970 1975	Average Annual Compound Growth Rate 1975 1980	Average Annual Compound Growth Rate 1980 1985	Percent Change 1983 1984	Percent Change 1984 1985
Alcoholic Beverages											
Beer	$8.8	$13.9	$22.0	$26.9	$27.7	$28.4	9.6%	9.6%	5.9%	3.0%	2.7%
Wine	1.9	3.5	6.3	7.8	8.0	8.5	13.0	12.5	6.5	2.6	4.7
Distilled Spirits	9.4	11.8	14.2	15.5	15.4	16.4	4.7	3.8	2.9	−0.1	3.0
Total Alcoholic Beverages[2]	$20.2	$29.2	$42.5	$50.2	$51.1	$53.3	7.6%	7.8%	5.0%	1.8%	3.1%
Non-Alcoholic Beverages											
Soft Drinks	$6.4	$13.5	$25.8	$34.1	$35.8	$38.2	16.1%	13.8%	8.7%	5.0%	6.1%
Coffee	1.8	2.5	5.6	4.9	5.0	5.1	6.8	17.5	−2.6	2.0	2.4
Milk	6.1	8.3	10.3	11.0	11.3	11.6	6.4	4.4	2.1	2.7	3.2
Fruit Juice/Drinks	2.2	3.4	7.1	8.9	10.8	11.0	9.1	15.9	9.9	21.4	6.0
Tea	0.3	0.6	1.0	1.2	1.3	1.3	14.9	10.8	5.3	8.0	4.1
Water	0.05	0.1	0.4	0.6	0.6	0.7	14.9	32.0	10.7	0.0	16.7
Other	0.2	0.4	0.7	0.8	0.8	0.9	14.9	11.8	3.3	0.0	4.5
Total Non-Alcoholic Beverages[2]	$17.2	$28.9	$50.9	$61.4	$65.5	$68.7	10.9%	12.0%	6.4%	6.7%	5.4%
Total Beverage Consumption[2]	$37.4	$58.1	$93.4	$111.6	$116.6	$122.1	9.2%	10.0%	5.8%	4.5%	4.4%

[1]Understates total consumer expenditures because on-premise sales are estimated at retail level.
[2]Addition of columns may not agree because of rounding.
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 42
Beverage Consumption Buying Power Survey, 1970-1985
Average Consumer Expenditures Per Gallon By Beverage Type
(Price per gallon)

Category/Type	1970	1975	1980	1983	1984	1985	Average Annual Compound Growth Rate 1970 1975	Average Annual Compound Growth Rate 1975 1980	Average Annual Compound Growth Rate 1980 1985	Percent Change 1983 1984	Percent Change 1984 1985
Alcoholic Beverages											
Beer	$2.31	$2.98	$3.99	$4.72	$4.89	$5.01	5.2%	6.0%	4.7%	3.6%	2.5%
Wine	7.29	9.62	13.14	14.74	14.55	14.70	5.7	6.4	2.3	−1.3	1.0
Distilled Spirits	24.30	26.41	31.34	35.17	35.58	37.60	1.7	3.5	3.7	1.2	3.5
Total Alcoholic Beverages	$4.52	$5.34	$6.59	$7.52	$7.69	$7.94	3.4%	4.3%	3.8%	2.3%	3.3%
Non-Alcoholic Beverages											
Soft Drinks	$1.16	$1.96	$2.63	$3.10	$3.10	$3.15	11.1%	6.1%	3.7%	0.0%	1.6%
Coffee	0.26	0.40	0.91	0.79	0.82	0.84	9.0	17.9	−1.6	3.8	2.4
Milk	1.12	1.57	2.09	2.23	2.25	2.29	7.0	5.9	1.8	0.9	1.8
Fruit Juice/Drinks	1.52	1.87	3.23	3.79	4.35	4.65	4.2	11.6	7.6	14.8	6.9
Tea	0.30	0.45	0.65	0.72	0.80	0.86	8.4	7.6	5.8	11.1	7.5
Water	0.30	0.45	0.70	0.80	0.80	0.80	8.4	9.2	2.7	0.0	0.0
Other	0.60	0.85	1.40	1.50	1.55	1.62	7.2	10.5	3.0	3.3	4.5
Total Non-Alcoholic Beverages	$0.82	$1.20	$1.98	$2.25	$2.34	$2.39	7.9%	10.5%	3.8%	4.0%	2.1%
Total Beverage Consumption	$1.47	$2.90	$2.89	$3.29	$3.37	$3.46	7.3%	6.8%	3.7%	2.4%	2.7%

SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 43
Selected Grocery Products—Shelf Space, Turnover, Sales per Foot

	Shelf Space—Average Linear Feet (End of May basis)					Annual Inventory Turnover (Based on April-May bimonth)			Dollar Sales per Month per Linear Foot		
	1981	1982	1983	1984	1985	1983	1984	1985	1983	1984	1985
Detergents, dry	63	64	64	67	67	23	29	26	$94	$100	$93
Detergents, liquid	58	61	61	62	65	27	29	30	34	34	45
Cleansing tissue	29	29	30	31	31	35	36	36	56	67	71
Toilet tissue	47	50	50	52	54	36	38	40	115	115	120
Paper towels	44	45	46	47	47	36	38	40	78	82	85
Ready-to-eat cereals	105	109	110	114	111	32	35	36	96	107	117
Coffee, regular	44	48	47	49	51	23	24	23	176	185	174
Cookies	N/A	N/A	151	163	169	19	21	20	44	50	47
Chewing Gum	53	55	58	59	61	10	10	10	17	26	26
Cat food—dry	29	31	32	31	N/A	30	32	N/A	57	56	N/A
—moist	14	15	15	16	N/A	25	26	N/A	37	44	N/A
—canned	50	53	55	51	N/A	29	30	N/A	46	53	N/A
Crackers	73	73	79	85	83	23	24	23	53	54	60
Soft Drinks	221	228	239	247	251	32	35	35	94	106	107
Soup, Canned & Dry	105	108	112	116	117	13	21	19	38	49	47
Fruit drinks, canned	47	50	50	53	53	16	29	28	130	NA	42

NOTE: Reprinted with permission of Progressive Grocer and the A. C. Nielsen Company.
N/A = Not Available
SOURCE: Progressive Grocer, September, 1984 and September, 1985; 1986 Nielsen Review of Retail Food Store Trends.

TABLE 44
1984 National Beverage Consumption by Geographic Region
(% of volume)

Region (Population Share)	Total (%)	Coffee (%)	Soft Drinks (%)	Milk (%)	Tea (%)	Fruit Juice Fruit Drinks (%)	Bottled Water (%)	Other Non-Alcoholic Beverages (%)	Wine (%)	Distilled Spirits (%)	Malt Beverages (%)
Northeast (21.8%)	21.3%	22.7%	18.8%	20.3%	21.0%	24.6%	26.4%	20.6%	28.0%	25.3%	23.3%
North Central (27.6%)	26.9	27.2	29.2	32.3	20.2	23.8	7.6	30.6	18.6	21.0	25.5
South (31.9%)	33.2	28.6	36.4	26.5	45.6	30.0	26.3	31.7	18.9	29.0	29.3
West (18.7%)	18.6	21.5	15.6	20.9	13.2	21.6	39.7	17.1	34.5	24.7	21.9
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 45
Percentage of Non-Alcoholic Beverage Drinkers By Geographic Region—1983

Category	Northeast	North Central	South	West
Soft Drinks				
Regular Cola*	59.5%	64.4%	71.7%	57.6%
Other Regular Carbonated*	57.6	58.5	52.7	56.3
Diet Cola*	35.4	35.0	32.0	37.9
Other Diet Carbonated*	31.5	30.3	26.3	33.2
Powdered**	38.0	51.5	41.7	34.1
Fruit Beverages				
Orange Juice**	55.3%	40.8%	49.1%	29.2%
Frozen Orange Juice**	60.5	66.9	59.8	67.6
Other Fruit Juices**	63.1	60.1	55.8	62.1
Tomato and Vegetable Juices**	51.0	55.1	46.0	50.8
Powdered Fruit Drinks**	14.5	22.1	18.6	17.1
Milk**	89.6	87.5	87.6	88.4
Coffee				
Ground**	60.5%	62.0%	54.1%	64.2%
Caffeinated Instant and Freeze Dried**	40.4%	32.6%	31.6%	30.1%
Decaffeinated Instant and Freeze Dried**	45.0%	43.0%	36.5%	38.4%
Tea				
Regular**	78.4%	68.8%	78.7%	70.1%
Canned*	16.3	10.7	13.2	11.4
Instant (unsweetened)**	23.9	34.8	27.4	24.4
Instant Iced Tea Mix**	45.0	30.5	22.5	27.0
Herbal**	27.4	31.5	24.0	46.8
Miscellaneous				
Bottled Water*	14.5%	6.4%	7.6%	17.8%

NOTE: * = Total adults
** = Female homemakers
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 45-A
Percentage of Non-Alcoholic Beverage Drinkers By Geographic Region—1984

Category	Northeast	North Central	South	West
Soft Drinks				
Regular Cola*	59.7%	64.8%	68.4%	61.1%
Other Regular Carbonated*	58.5	57.8	49.8	54.7
Diet Cola*	37.7	42.0	35.9	44.5
Other Diet Carbonated*	31.0	32.2	26.7	37.1
Powdered**	38.1	52.3	43.3	36.0
Fruit Beverages				
Orange Juice**	62.1%	43.0%	49.9%	35.5%
Frozen Orange Juice**	59.1	69.3	59.8	69.1
Other Fruit Juices**	65.6	63.4	58.0	65.1
Tomato and Vegetable Juices**	50.8	61.6	45.6	56.7
Powdered Fruit Drinks**	13.8	18.4	19.1	14.6
Milk**	90.1%	90.7%	89.5%	87.2%
Coffee				
Ground**	61.3%	64.7%	51.7%	58.7%
Caffeinated Instant and Freeze Dried**	45.0%	32.7%	34.7%	35.7%
Decaffeinated Instant and Freeze Dried**	48.4%	39.6%	35.8%	37.0%
Tea				
Regular**	80.1%	70.3%	75.2%	71.2%
Canned*	16.2	11.1	13.0	11.7
Instant (unsweetened)**	21.3	36.6	24.7	26.6
Instant Iced Tea Mix**	47.7	30.9	19.5	26.1
Herbal**	30.1	32.3	25.7	47.8
Miscellaneous				
Bottled Water*	16.3%	5.6%	9.2%	21.6%

NOTE: * = Total adults
** = Female homemakers
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

TABLE 46
Quantity and Value of Coin-Operated Soft Drink Vending Machines Sold
1965-1984

Year	Number of Companies Manufacturing Vending Machines			Number of Machines			Value of Machine Shipments ($1,000's)		
	Can	Bottle	Cup	Can	Bottle	Cup	Can	Bottle	Cup
1984	5	2	4	183,528[2]	—	W	$197,691[2]	—	W
1983	5	5	5	157,265[2]	—	W	156,179[2]	—	W
1982	5	5	5	210,312[2]	—	W	190,089[2]	—	W
1981	7	6	6	96,160	76,937	8,509	99,518	$68,132	$23,888
1980	7	5	6	94,813	66,663	8,415	97,545	51,251	21,417
1979	9	6	5	109,324	69,527	12,144	102,956	50,698	30,573
1978	9	6	6	141,639	64,372	11,690	119,091	43,018	26,084
1977	10	6	6	127,930	57,896	9,118	102,382	38,379	18,585
1976	10	6	5	84,859	62,428	7,768	61,263	39,070	15,575
1975	12	6	5	39,242	48,889	8,139	27,955	30,629	13,736
1974	11	6	5	64,450	53,076	11,936	38,670	27,587	21,019
1973	11	6	4	86,405	62,474	15,214	29,439	30,306	25,050
1972	10	6	4	89,371	57,037	14,582	51,797	29,418	23,910
1971	10	6	4	84,190	56,038	10,912	49,453	28,211	19,100
1970	8	6	9	59,004	56,054	11,562	33,145	29,121	18,603
1969	11	6	5[1]	60,743	53,451	16,011	32,676	26,804	24,736
1968	10	7	6[1]	63,910	65,357	16,225	37,676	32,960	23,527
1967	9	8	5[1]	51,906	87,600	16,180	26,809	40,024	23,196
1966	9	9	5[1]	37,271	123,695	20,855	19,260	51,069	29,369
1965	7	9	6[1]	29,086	145,838	19,742	13,522	55,478	25,696

[1] Number of companies manufacturing post-mix vending machines.
[2] Can + Bottle.
NOTE: W = Data Withheld.
SOURCE: U.S. Department of Commerce, Census Bureau, Current Industrial Reports, 1965-1984.

TABLE 47
Soft Drink Industry Vending
1971-1985

Year	Vended Cup Cold Soft Drinks			Vended Can Cold Soft Drinks			Vended Bottle Cold Soft Drinks			Total		
	Dollar Volume (Thous. $)	Unit Volume (Thous.)	Machines on Location	Dollar Volume (Thous. $)	Unit Volume (Thous.)	Machines on Location	Dollar Volume (Thous. $)	Unit Volume (Thous.)	Machines on Location	Dollar Volume (Thous. $)	Unit Volume (Thous.)	Machines on Location
1985	$1,310,000	4,026,000	221,200	$4,430,000	9,500,000	1,000,000	$1,570,000	4,250,000	794,000	$7,310,000	18,046,000	2,015,000
1984	1,190,000	3,900,000	217,400	4,040,000	8,700,000	930,000	1,500,000	4,230,000	793,000	6,730,000	16,830,000	1,940,400
1983	1,135,000	3,837,000	217,000	3,500,000	7,780,000	880,000	1,332,000	4,100,000	813,000	5,967,000	15,717,000	1,910,000
1982	1,063,000	3,798,000	218,000	3,340,000	7,770,000	830,000	1,316,000	4,180,000	820,000	5,719,000	15,748,000	1,868,000
1981	1,075,000	4,060,000	219,800	3,033,000	7,490,000	800,000	1,337,000	4,385,000	827,000	5,445,000	15,935,000	1,846,800
1980	980,000	4,115,000	219,800	2,742,000	7,140,000	750,000	1,225,000	4,435,000	829,000	4,947,000	15,690,000	1,798,800
1979	892,000	4,113,000	219,700	2,441,000	6,975,000	725,000	1,193,000	4,553,000	814,300	4,526,000	15,641,000	1,759,000
1978	750,000	3,907,000	217,800	1,890,000	6,290,000	672,000	1,075,000	4,250,000	817,300	3,715,000	14,447,000	1,707,100
1977	693,000	3,915,000	218,200	1,685,000	5,730,000	609,000	1,044,000	4,295,000	834,000	3,422,000	13,940,000	1,661,200
1976	675,000	3,880,000	219,500	1,425,000	5,165,000	546,000	989,000	4,300,000	844,000	3,089,000	13,345,000	1,609,500
1975	675,000	3,880,000	219,500	1,300,000	4,720,000	519,000	945,000	4,400,000	854,000	2,920,000	13,040,000	1,592,500
1974	664,000	4,420,000	221,700	1,090,000	4,550,000	500,000	888,000	4,728,000	866,000	2,642,000	13,698,000	1,587,700
1973	595,000	4,410,000	221,000	848,000	4,240,000	466,000	765,000	4,725,000	865,300	2,208,000	13,375,000	1,552,300
1972	517,000	4,140,000	216,900	641,000	3,566,000	403,400	668,000	4,456,000	856,900	1,826,000	12,162,000	1,477,200
1971	455,600	3,796,300	213,800	561,700	2,808,400	333,700	644,200	4,051,500	844,100	1,661,500	10,656,200	1,391,600

SOURCE: Reprinted from Vending Times Annual Survey, 1986.

Section VIII

Soft Drink Industry Vending, Advertising, Capital Spending and Inventories

In 1985, it is estimated that there were over 2.01 million soft drink vending machines at locations throughout the country as reported by the Department of Commerce's Census Bureau. This shows an increase of 44.9% over 1971. During this fourteen-year period, total vended soft drink sales, in 1985, reached close to 18 billion units of soft drinks, up 69% from 1971 and about 4 times the value at $7,310 million.

Vended can soft drinks had the highest dollar and unit volume in 1984, with vended bottles and cold cup soft drinks following. However, this was not the case thirteen years earlier when vended bottle soft drinks led in unit volume, followed by cups and then cans. The value of soft drinks sold in cup vending machines increased 188% from $455.6 million in 1971 to $1,310.0 million in 1985. Unit volume for this category increased 6.1% during the period. The number of canned soft drinks sold through vending machines grew 238% from 1971 to 1985, while the value of vended can sales increased more than eight times to $4,430 million. Vended bottle soft drink unit volume increased 4.9% to 4,250 million while dollar volume more than doubled to $1,570 million.

In 1984, 214,000 soft drink vending machines were purchased valued at $183 million. The number of can and bottle vending machines purchased increased 22.1% from 1971 to 1984.

Capital expenditures by the nation's bottlers almost continuously increased throughout the 1970's and early 1980's. The latest U.S. government figures show that capital spending increased 3.7 times from $185.1 million in 1970 to $694.1 million in 1984. The majority of these funds (83.5%) were used for new machinery and equipment, while the remainder (16.5%) went for new structures and plant additions. Although capital spending has consistently increased during the thirteen-year period 1970-1983, the percentage of the total allocated to plant or to equipment has fluctuated throughout the years from 71.0% for equipment in 1970 to 84.0% in 1981.

Inventories have steadily increased since 1965 as the industry expanded total volume, packaging mix and its product line. Year-end inventories in 1984 were $915.1 million, 253% higher than year-end 1970, at $258.9 million. Average year-end inventories represented 4.3% of annual industry shipments in 1984.

According to the *Impact Beverage Trends in America Review and Forecast*, beverage industry advertising expenditures have increased steadily over the past fifteen years. The soft drink industry spent a reported $592 million in 1970 and increased advertising outlays 283% to $2,265 million in 1985. Soft drinks represented 26.6% of the beverage industry market in 1985. During 1985, the greatest amount of advertising money was spent promoting beer ($774 million) while the least reported was spent promoting bottled waters ($15 million). From 1970-1985 soft drink advertising increased 339% from $115 million to $505 million.

TABLE 48
Soft Drink Industry Capital Spending and Inventories 1965-1984

Year	Capital Spending (Mil. $)	End of Year Inventories (Mil. $)	Inventory (Year-End) Sales Ratio (%)
1984	$694.1	$915.1	4.3%
1983	680.5	885.0	4.6
1982	649.5	887.9	4.2
1981	597.3	770.2	3.8
1980	651.9	703.7	4.0
1979	565.2	676.4	4.5
1978	490.5	635.3	4.8
1977	423.6	551.7	4.8
1976	325.2	459.7	4.4
1975	219.2	447.1	4.8
1974	195.3	419.1	5.4
1973	237.7	320.0	5.1
1972	207.0	281.0	4.9
1971	168.1	271.7	5.1
1970	185.1	258.9	5.4
1969	154.8	222.1	5.1
1968	139.9	201.1	4.8
1967	168.2	187.0	5.4
1966	151.1	144.3	4.5
1965	111.0	127.4	4.7

SOURCE: U.S. Department of Commerce: Bureau of Census-Census of Manufacturers: 1972,1977 and 1982. National Soft Drink Association Sales Surveys of the Soft Drink Industry: 1965-1984. Annual Survey of Manufacturers: 1976, 1978, 1979, 1980, 1983 and 1984.

TABLE 49
Capital Expenditures in the Soft Drink Bottling and Canning Industry 1965-1984
(Thousands of dollars)

	New Machinery and Equipment		New Structures and Additions to Plant		
Year	Amount	Percent of Total Expenditures	Amount	Percent of Total Expenditures	Total
1984	N/A	N/A	N/A	N/A	$694,100
1983	$568,500	83.5%	$112,100	16.5%	680,500
1982	582,300	82.5	123,600	17.5	705,900
1981	501,700	84.0	95,600	16.0	597,300
1980	540,100	82.9	111,700	17.1	651,900
1979	461,400	81.8	102,900	18.2	564,300
1978	380,400	77.6	110,100	22.4	490,500
1977	351,000	82.9	72,600	17.1	423,600
1976	251,200	77.0	7,400	23.0	325,200
1975	168,100	77.0	51,100	23.0	219,200
1974	160,300	82.0	35,000	18.0	195,300
1973	182,800	76.9	54,900	23.1	237,700
1972	171,200	82.6	35,800	17.4	207,000
1971	134,100	79.8	33,900	20.2	168,000
1970	137,000	71.0	55,900	29.0	192,900
1969	107,000	69.1	47,800	30.9	154,800
1968	103,300	73.8	36,600	26.2	139,900
1967	127,500	75.8	40,600	24.2	168,100
1966	117,292	77.6	33,793	22.4	151,085
1965	88,843	80.0	22,193	20.0	111,036

SOURCE: U.S. Department of Commerce: Census of Manufactures: 1963, 1967, 1972, 1977, 1982, 1983 and 1984, and Annual Survey of Manufacturers: 1965, 1966, 1968, 1969, 1970, 1971, 1973, 1974, 1975, 1976 and 1978.

TABLE 50
Beverage Industry Advertising Expenditures
(Millions of dollars)

Category/Type	1970	1975	1980	1981	1982	1983	1984	1985	Average Annual Compound Growth Rate 1970 1975	1975 1980	1980 1985	Percent Change[1] 1980 1981	1981 1982	1982 1983	1983 1984	1984 1885
Alcoholic Beverages																
Beer	$132	$145	$420	$465	$534	$654	$755	$774	1.9%	23.7%	13.0%	10.7%	14.8%	22.5%	19.3%	2.5%
Wine	32	59	135	173	189	167	183	213	13.0	18.0	9.5	28.2	9.3	−11.6	16.8	16.4
Distilled Spirits	163	197	348	377	386	362	346	303	3.9	12.1	−2.7	8.3	2.4	−6.2	0.8	−12.4
Total Alcoholic Beverages	$327	$401	$903	$1,015	$1,109	$1,183	$1,284	$1,290	4.2%	17.6%	7.4%	12.4%	9.3%	6.7%	13.3%	0.5%
Non-Alcoholic Beverages																
Soft Drinks[2]	$115	$149	$344	$337	$342	$416	$485	$505	5.3%	18.2%	8.0%	−2.0%	1.5%	21.6%	19.0%	4.1%
Coffee	71	80	216	208	213	182	202	185	2.4	22.0	−3.1	−3.7	2.4	−14.6	12.6	−8.4
Milk	14	24	35	34	35	45	45	45	11.4	7.8	5.2	−2.9	2.9	28.6	−11.1	—
Fruit Juice/Drinks	35	48	75	89	99	122	157	150	6.5	9.3	14.9	18.7	11.2	23.2	23.0	−4.5
Tea[3]	14	15	26	30	27	26	32	28	1.4	11.6	1.5	15.4	−10.0	−3.7	15.4	−12.5
Bottled Water	*	1	9	9	9	10	10	15	*	*	10.8	—	—	11.1	—	50.0
Other[4]	16	20	24	25	30	31	37	47	4.6	3.7	14.4	4.2	20.0	3.3	32 3	27.0
Total Non-Alcoholic Beverages	$265	$337	$729	$732	$755	$832	$968	$975	4.9%	16.7%	6.0%	0.4%	3.1%	10.2%	16.7%	0.7%
Total Beverage Expenditures	$592	$738	$1,632	$1,747	$1,864	$2,015	$2,252	$2,265	4.5%	17.2%	6.8%	7.1%	6.7%	8.1%	14.7%	0.6%

[1]Based on rounded data.
[2]Includes carbonated and powdered soft drinks.
[3]Excludes herbal teas.
[4]Powdered breakfast beverages, cocoa/chocolate drinks, non-alcoholic cocktail mixes, infant juices and herbal teas.
NOTE: * = Less than $500,000.
SOURCE: The Impact Beverage Trends in America Review and Forecast, New York, N.Y.

Section IX

Sweetener Use and Production

Domestic consumption of refined sugar has been decreasing since 1977 when it peaked at 10.4 million tons. Since then consumption has declined 28% to 7.5 million tons in 1985. On a per capita basis, annual consumption was 63.3 pounds in 1985, decreasing 33% from 1977 levels. However, per capita consumption of corn sweeteners, primarily high fructose corn syrup (HFCS), has been steadily increasing.

HFCS consumption has experienced tremendous growth rates since 1967. At that time, HFCS represented less than .1 percent of all caloric sweetener consumed and was not found in any of the major soft drink brands. According to NSDA's 1985 *Sales Survey*, HFCS comprised 74.7% of sweeteners used in soft drinks, compared to only 1.4% of beet/cane sugar used.

Perhaps the greatest growth has occurred, however, in the consumption of non-caloric sweeteners. Since its introduction in 1981, per capita aspartame consumption has grown from .2 pounds to 11.0 pounds in 1985. With the increasing popularity of diet soft drinks, the quantity of aspartame added to soft drinks in 1984 grew to 8.2 million pounds compared with 3.4 million pounds in 1983. During the same period, the amount of saccharin consumed in soft drinks decreased to .8 million pounds in 1983 from 3.2 million pounds in 1984.

The decline in sugar deliveries in recent years was primarily for beverages, mainly soft drinks, commercially processed foods, and liquid sugar. The decline in the majority of these categories appears to be attributed to HFCS deliveries. In 1985, the beverage industry received 339 thousand tons of refined sugar, down 84% from 1980. Total U.S. shipments of refined sugar were down 21% during this period.

The prices of HFCS and sugar have been increasing since 1978. In 1985, sugar was selling for approximately 31 cents a pound on the domestic market while HFCS was selling for around 19.1 cents. These prices reflect an approximate 65% and 52% increase for sugar and HFCS, respectively, since 1978.

TABLE 51
U.S. Sugar Deliveries
(Thousands of tons)
1975-1985

Type of Buyer	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985
Industrial Users:											
Beverage Use	2,074	2,252	2,454	2,608	2,411	2,161	1,852	1,583	1,248	908	339
Food Use											
Bakery and Cereal Products	1,242	1,313	1,387	1,308	1,289	1,337	1,306	1,296	1,387	1,404	1,499
Confectionary Products	796	914	951	912	911	932	983	940	1,087	1,115	1,060
Processed Foods	741	737	745	689	681	535	484	450	454	433	422
Dairy Products	511	552	567	531	480	450	459	404	385	408	441
Other	486	519	543	412	483	589	581	526	431	416	438
Total	3,776	4,035	4,193	3,852	3,844	3,843	3,813	3,616	3,744	3,776	3,860
Total Industrial Users	5,850	6,287	6,647	6,460	6,255	6,004	5,665	5,199	4,992	4,684	4,199
Total Non-Industrial Users	3,338	3,655	3,600	3,406	3,553	3,353	3,421	3,214	3,076	3,053	3,149
Total Food and Beverage Use	9,188	9,942	10,247	9,866	9,808	9,357	9,086	8,413	8,068	7,736	7,341
Non-Food Use	85	101	104	161	126	120	126	106	131	127	131
Total Food and Non-Food Use	9,273	10,043	10,351	10,027	9,934	9,477	9,212	8,519	8,199	7,863	7,472

SOURCE: U.S. Department of Agriculture, Sugar and Sweetener Situation and Outlook Yearbook, 1976-1986.

TABLE 51-A
Percentage of Sweetener Used in the Soft Drink Industry
1984-1985

	1984	1985
Beet/Cane Sugar	3.0%	1.4%
HFCS	43.0%	74.7%
Sugar + HFCS	32.7%	2.1%
Aspartame	2.8%	17.1%
Saccharin	5.0%	0.2%
Aspartame + Saccharin	13.0%	4.1%
Other Natural Sweeteners	0.1%	—
Natural (no sweetener added)	0.1%	—
Unsweetened	0.3%	0.4%
	100.0%	100.0%

SOURCE: The 1984 and 1985 NSDA Sales Survey of the Soft Drink Industry, Washington, D.C.

TABLE 51-B
Sweetener Use by Quantities and Sweetener Equivalent
1984-1985

	1984 Quantities (thousand lbs.)	1984 Sweetener Equivalent (thousand lbs.)
Beet/Cane Sugar	1,117,000	1,117,000
HFCS	6,177,000	6,177,000
Aspartame	3,360	672,000
Saccharin	3,170	951,000
	1985 Quantities (thousand lbs.)	**1985 Sweetener Equivalent (thousand lbs.)**
Beet/Cane Sugar	185,700	185,700
HFCS	7,411,700	7,411,700
Aspartame	8,228	1,563,300
Saccharin	3,170	951,000

SOURCE: The 1984 and 1985 Sales Survey of the Soft Drink Industry, Washington, D.C.

ERRATA -- Table 51-B
Saccharin, 1985
Quantity - 826
Equivalent - 247,800

TABLE 52
Selected Wholesale Prices Corn Sweeteners and Bulk Dry Beet Sugar
U.S. Annual Average 1975-1985
(Cents per pound, dry basis)

	High Fructose Corn Syrup				
	New York	Chicago	California	New Orleans	Bulk Dry Beet Sugar
Year		Weekly Quotes			Monthly Quotes
1985	19.38	18.12	19.58	19.26	23.18
1984	20.42	19.58	21.25	20.46	25.66
1983	19.21	17.79	20.61	18.75	26.31
1982	16.82	14.30	18.25	15.59	27.62
1981	21.94	21.47	22.31	22.45	29.29
1980	24.27	23.64	26.11	24.39	30.76
1979	13.54	13.15	14.61	14.18	18.49
1978	12.32	12.12	12.64	13.26	17.16
1977	13.05	12.44	13.52	12.99	14.66
1976	15.46	14.03	14.77	14.62	16.50
1975	23.52	22.67	23.49	23.89	27.47

SOURCE: Weekly Quotes, "Milling and Baking News". Monthly quotes, U.S. Bureau of Labor Statistics, as reported in the U.S. Department of Agriculture, Sugar and Sweetener Situation and Outlook Yearbook, 1976-1986.

TABLE 53
State-By-State U.S. Sugar Production 1979-1985

	Acres Harvested—Cane Acres Planted—Beet (Thous.)							Production (Thous. tons)						
	1979	1980	1981	1982	1983	1984	1985	1979	1980	1981	1982	1983	1984	1985
Arizona	11.3	9.1	12.6	12.8	—	—	—	217	208	100	298	—	—	—
California	215.0	229.0	260.0	162.0	169.0	208.0	203.0	5,719	5,885	7,254	3,852	3,938	5,118	4,771
Colorado	73.0	91.0	77.0	46.0	37.2	44.2	2.5	1,358	1,729	1,733	920	603	964	46
Florida[1]	318.2	320.7	334.4	341.4	361.1	370.8	383.4	9,975	9,985	9,530	12,086	11,330	12,162	12,615
Hawaii[1]	100.6	97.4	97.6	89.1	92.8	89.4	83.0	9,632	9,214	8,831	8,808	8,926	8,990	7,916
Idaho	125.9	137.9	144.4	136.0	145.0	144.0	152.0	2,820	3,296	3,754	3,382	3,487	3,312	3,496
Kansas	12.0	14.5	14.0	9.5	6.9	7.1	0.1	253	200	284	170	95	122	—
Louisiana[1]	240.0	232.0	247.0	234.0	245.0	205.0	226.0	4,950	5,414	6,650	6,450	5,850	4,310	5,430
Michigan	88.0	97.0	99.0	96.5	104.0	108.0	118.0	1,550	1,892	2,080	1,854	1,976	2,317	2,325
Minnesota	244.0	244.0	256.0	252.0	259.0	261.0	276.0	3,782	3,623	4,403	4,738	4,662	4,346	5,088
Montana	43.4	44.3	44.5	43.0	41.3	24.6	42.7	829	879	926	850	818	416	811
Nebraska	72.4	85.0	78.4	45.4	65.3	67.5	53.2	1,462	1,777	1,889	926	1,233	1,480	1,229
New Mexico	2.0	1.6	2.1	0.7	—	—	—	30	37	43	12	—	—	—
North Dakota	143.1	142.7	144.9	144.8	142.2	139.1	144.2	2,804	2,017	2,693	2,476	2,404	2,309	2,423
Ohio	13.7	17.8	14.4	—	12.6	10.6	12.7	266	339	274	—	222	204	258
Oregon	6.7	7.2	10.7	10.1	11.1	11.6	11.8	178	197	300	231	116	113	319
Texas[2]	50.4	57.9	61.8	65.1	66.4	73.1	67.4	1,385	1,355	1,729	1,661	1,717	1,890	1,749
Utah	1.5	0.7	—	—	—	—	—	30	15	—	—	—	—	—
Washington	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Wyoming	38.2	45.1	44.9	38.4	32.1	32.7	39.4	906	1,024	1,078	810	616	654	1,037
Total	1,809.4	1,871.1	1,943.7	1,727.2	1,789.2	1,796.9	1,825.1	47,406	49,084	53,703	49,343	48,193	48,727	49,513

	Price Per Ton							Value (Thous. $)						
	1979	1980	1981	1982	1983	1984	1985	1979	1980	1981	1982	1983	1984	1985
Arizona	27.90	53.40	33.70	34.70	—	—	N/A	6,054	11,086	10,110	10,341	—	—	N/A
California	33.10	53.20	32.00	33.50	40.20	35.50	N/A	177,861	401,312	242,128	127,316	158,308	178,589	N/A
Colorado	34.10	47.50	33.60	35.00	33.40	22.40	N/A	46,108	82,128	58,575	32,200	20,140	21,594	N/A
Florida[1]	30.30	39.40	28.60	28.20	28.60	28.90	N/A	302,243	393,409	272,558	340,674	324,038	349,414	N/A
Hawaii[1]	22.60	41.80	23.50	26.20	29.90	30.40	28.1	217,683	385,145	207,529	230,770	266,867	256,536	228,425
Idaho	37.60	46.20	32.50	37.20	40.50	37.10	N/A	106,032	152,275	122,035	118,170	141,224	122,875	N/A
Kansas	31.40	41.70	30.50	33.40	29.70	23.40	N/A	6,668	8,340	8,662	5,338	2,822	2,611	N/A
Louisiana[1]	24.20	33.20	22.90	25.10	25.30	23.90	N/A	119,790	179,743	152,285	161,895	148,005	107,789	N/A
Michigan	38.90	40.70	26.50	35.80	36.20	34.40	N/A	60,295	77,006	55,795	66,337	71,531	72,825	N/A
Minnesota	31.80	44.10	29.00	34.30	35.40	35.40	N/A	120,268	159,686	88,060	162,513	165,035	153,816	N/A
Montana	37.30	51.40	37.20	42.40	37.60	35.50	N/A	30,922	45,181	34,447	36,040	30,757	14,768	N/A
Nebraska	34.00	47.00	33.70	34.90	31.60	22.70	N/A	49,708	83,519	63,639	32,317	38,963	33,596	N/A
New Mexico	34.20	47.30	32.60	36.10	—	—	N/A	1,026	1,750	1,402	433	—	—	N/A
North Dakota	34.10	46.30	20.30	33.70	33.40	17.40	N/A	78,566	93,387	55,248	88,193	85,102	85,433	N/A
Ohio	32.80	46.20	28.90	—	34.70	23.60	N/A	8,725	15,662	7,919	—	7,708	4,744	N/A
Oregon	33.00	42.30	30.00	36.10	40.70	36.30	N/A	5,874	8,337	9,000	9,111	12,861	1,296	N/A
Texas[2]	27.72	31.54	20.79	25.25	22.02	27.17	N/A	12,830	42,742	35,944	41,951	38,849	24,220	N/A
Utah	38.80	47.10	—	—	—	—	N/A	1,164	707	—	—	—	—	N/A
Washington	—	—	—	—	—	—	N/A	—	—	—	—	—	—	N/A
Wyoming	38.00	50.90	38.00	38.80	34.20	42.00	N/A	34,426	52,122	40,964	31,428	21,067	20,928	N/A
Total	29.67	42.65	27.08	30.31	31.82	30.80	31.0	1,406,483	2,093,533	1,454,290	1,444,929	1,533,292	747,400	752,247

[1]Cane Production; all other states are beet production.
[2]Includes cane and beet production.
[3]Excludes sugar cane for seed.
N/A: Not Available.
SOURCE: U.S. Department of Agriculture, Sugar and Sweetener Situation and Outlook Yearbook 1986, 1986; Annual Publications, 1980-1986.

TABLE 54
Caloric and Non-caloric Sweeteners
Per Capita U.S. Consumption in Pounds
1965-1985

	Refined Cane and Beet Sugar						Corn Sweeteners[1]				Minor Caloric[1]				Non-caloric Sweeteners[1]			
	U.S. Grown Sugar			Cane Sugar			Corn Syrup											
Year	Beet Sugar	Cane Sugar	Total	Imported	Total	TOTAL	High Fructose	Glucose	Dextrose	Total	Honey	Edible Syrups	Total	TOTAL	Saccharin	Cyclamate[2]	Aspartame	Total Non-caloric
1985	23.3	19.6	42.9	20.4	40.0	63.3	43.5	18.0	3.5	65.0	1.0	0.4	1.4	129.8	6.0	N/A	11.0	17.0
1984	23.3	21.5	44.8	22.9	44.4	67.7	36.3	18.0	3.5	57.8	1.0	0.4	1.4	126.7	10.0	N/A	5.8	15.8
1983	22.1	26.4	48.5	22.6	49.0	71.1	30.7	18.0	3.5	52.2	1.2	0.4	1.6	124.8	9.5	N/A	3.5	13.0
1982	25.4	22.5	49.8	24.9	47.4	73.7	26.7	18.0	3.5	48.2	0.9	0.4	1.3	124.2	8.4	N/A	1.0	9.4
1981	25.6	21.5	47.1	32.4	53.9	79.5	23.3	17.8	3.5	44.6	0.8	0.4	1.2	125.3	8.0	N/A	0.2	8.2
1980	26.9	24.3	51.2	32.5	56.8	83.7	19.2	17.6	3.5	40.3	0.8	0.4	1.2	125.2	7.7	N/A	N/A	7.7
1979	26.5	21.1	47.6	41.7	62.8	89.3	14.9	17.9	3.6	36.4	1.0	0.4	1.4	127.1	7.4	N/A	N/A	7.4
1978	27.4	22.9	50.3	41.2	64.1	91.5	12.1	17.8	3.8	33.7	1.1	0.4	1.5	126.7	7.1	N/A	N/A	7.1
1977	29.8	22.9	52.7	41.5	64.4	94.2	9.5	17.6	4.1	31.2	1.0	0.4	1.4	126.8	6.6	N/A	N/A	6.6
1976	32.0	22.4	54.4	39.0	61.4	93.4	7.2	17.5	5.0	29.7	0.9	0.4	1.3	124.4	6.1	N/A	N/A	6.1
1975	30.1	24.6	54.7	34.4	59.0	89.1	5.0	17.5	5.0	27.5	1.0	0.4	1.4	118.0	6.2	N/A	N/A	6.2
1974	25.8	20.8	46.6	49.0	69.8	95.6	3.0	17.2	4.9	25.1	0.7	0.4	1.1	121.8	5.9	N/A	N/A	5.9
1973	30.2	24.7	54.9	45.9	70.6	100.8	2.1	16.5	4.8	23.4	0.9	0.5	1.4	125.6	5.1	N/A	N/A	5.1
1972	30.3	25.3	55.6	46.7	72.0	102.3	1.3	15.4	4.4	21.1	1.0	0.5	1.5	124.9	5.1	N/A	N/A	5.1
1971	30.6	22.9	53.5	48.6	71.5	102.1	0.9	14.9	5.0	20.8	0.9	0.5	1.4	124.3	5.1	N/A	N/A	5.1
1970	31.3	23.0	56.3	45.4	70.4	101.7	0.7	14.0	4.6	19.3	1.0	0.5	1.5	122.5	5.8	N/A	N/A	5.8
1969	30.3	25.3	55.6	45.4	70.7	101.0	0.5	13.2	4.5	18.2	1.0	0.6	1.6	120.8	5.3	1.6	N/A	6.9
1968	27.8	26.8	54.6	44.6	71.4	99.2	0.3	12.6	4.3	17.2	0.9	0.7	1.6	118.0	5.0	2.2	N/A	7.2
1967	26.6	29.6	56.2	42.3	71.9	98.5	0.1	11.9	4.2	16.2	0.9	0.5	1.4	116.1	4.8	2.1	N/A	6.9
1966	28.3	28.7	57.0	40.3	69.0	97.3		11.2	4.2	15.4	1.0	0.7	1.7	114.4	4.5	1.9	N/A	6.4
1965	29.1	30.1	59.2	37.8	67.9	97.0		11.0	4.1	15.1	1.1	0.7	1.8	113.9	4.0	1.7	N/A	5.7

[1]Dry basis. Recent corn sweetener consumption may be understated due to incomplete data.
[2]Sugar sweetness equivalent — assumes saccharin is 300 times as sweet as sugar, cyclamate is 30 times as sweet as sugar, and Aspartame is 200 times as sweet as sugar.
[3]Cyclamate food use was banned by the Food and Drug Administration, effective in 1970.
SOURCE: U.S. Department of Agriculture, Sugar and Sweetener Situation and Outlook Yearbook, 1966-1986.

Section X

Soft Drink Industry Summary and Outlook

The data in this publication are of two types—industry and product. Industry data are obtained from all establishments which produce soft drinks as their primary product. Thus, industry data include some non-soft drink data. Product data are obtained from all establishments which produce soft drinks, whether primary or secondary. Product data, therefore, include data on soft drinks alone. Most data in this publication are of the industry type.

According to the U.S. Department of Commerce, the current dollar industry value of shipments for bottled and canned soft drinks in 1985 reached $19.8 billion. This is 17.8% above the 1982 level of $16.8 billion. The current dollar product value of shipments for soft drinks increased 21.5% from $14.9 billion in 1982 to $18.2 billion in 1985. In constant dollars, the soft drink industry value of shipments rose 10.1% from 1982 to 1986. The constant dollar product value of shipments increased 15.1% during the same period.

The industry shipments and product shipments deflators, respectively, are used to develop the constant dollar measures of industry and product shipments. The deflators reflect price changes. Differences in the industry and product shipments deflators are due to differences in industry and product data.

The soft drink industry made impressive gains in the 1970's and early 1980's. According to the U.S. Department of Commerce, value of shipments for bottled and canned soft drinks in 1984 reached $19.8 billion, 42% above the 1980 level of nearly $14 billion. Per capita consumption of soft drinks was 43.0 gallons in 1985, compared to 24.3 gallons in 1971. The NSDA Sales Survey disclosed that cola, the most popular packaged beverage, accounted for 66% of 1985 sales volume of regular packaged sales. Lemon-lime flavored drinks ranked second with about 11% of regular packaged volume. Total soft drink volume consisted of about 78% regular, 21% low calorie soft drinks and 1% water. Packaged soft drinks accounted for 76% of sales in 1984 with bulk at 24%.

Employment in the bottled and canned soft drink industry in 1985 was estimated by the U.S. Department of Labor at 127,100, down from 130,800 in 1970. Production workers totaled 41,700 in 1984, down from 48,900 in 1970. Average hourly wages of production workers rose from $2.77 per hour in 1970 to $8.68 in 1984, a compound increase of 8% annually.

Continued growth in the soft drink industry throughout the 1980's can be expected, although at rates which may not be as high as the levels achieved during the 1970's. Such growth should continue to outpace that of other beverage products and allow soft drinks to continue to be the beverage leader in consumption in the United States.

TABLE 55
State-By-State U.S. Corn Production 1978-1984
Domestic Corn
Acres Harvested and Production—Major States
1978-1985

	Acres Harvested (Thous.)								Production (Thous. Bushels)							
	1978	1979	1980	1981	1982	1983	1984	1985	1978	1979	1980	1981	1982	1983	1984	1985
Alabama	544	502	423	620	450	305	385	525	27,200	30,622	13,228	34,100	29,700	17,995	25,025	24,375
Arizona	30	45	40	35	25	17	26	21	3,750	5,175	4,000	4,550	3,375	2,312	3,250	2,205
Arkansas	30	45	37	49	30	31	49	73	1,800	2,101	1,036	1,185	2,460	2,640	4,633	7,884
California	281	260	270	275	110	260	375	320	35,406	30,420	36,450	35,750	42,900	13,280	31,000	46,400
Colorado	710	760	760	790	810	610	680	745	80,308	96,520	89,680	108,240	110,390	74,420	91,120	103,355
Delaware	157	159	177	181	182	145	150	175	15,072	16,218	12,744	13,024	18,564	10,875	16,950	19,075
Florida	342	339	328	327	245	122	210	190	17,784	17,967	15,416	17,985	15,190	8,174	11,630	12,350
Georgia	1,300	1,350	1,300	1,380	815	715	985	975	77,500	100,750	54,600	69,000	69,275	55,125	80,750	83,900
Idaho	58	50	50	62	63	63	75	80	5,046	440	5,250	6,820	7,800	7,533	8,850	10,000
Illinois	11,170	11,050	11,460	11,260	11,380	7,900	10,940	11,370	1,239,870	1,414,400	1,065,780	1,452,540	524,920	624,100	1,247,160	1,514,950
Indiana	6,200	6,030	6,280	6,000	6,320	4,670	6,030	6,350	669,600	675,360	602,880	654,000	815,280	340,910	705,510	756,450
Iowa	12,850	13,100	13,600	13,700	13,350	8,350	12,900	13,550	1,477,750	1,663,700	1,463,000	1,749,900	591,350	743,850	1,444,800	1,707,300
Kansas	1,500	1,470	1,180	1,260	1,230	880	955	1,080	133,000	171,990	110,920	158,760	140,220	81,840	119,475	140,400
Kentucky	1,410	1,400	1,480	1,490	1,490	960	1,460	1,560	119,850	132,600	103,600	149,000	157,940	46,080	146,000	159,120
Louisiana	47	41	91	53	40	36	82	205	2,773	2,214	3,380	2,409	3,120	5,040	9,430	23,370
Maryland	590	595	640	690	660	545	590	640	57,230	58,905	46,080	72,450	70,620	47,060	69,620	70,400
Michigan	2,400	2,500	2,660	2,850	2,820	1,800	2,620	2,750	194,400	247,500	247,000	271,600	107,480	163,600	220,080	286,650
Minnesota	6,100	6,060	6,290	6,770	6,300	4,370	6,440	6,300	643,760	606,000	610,130	744,700	334,300	367,080	689,080	724,500
Mississippi	115	110	88	115	90	55	70	115	7,360	5,720	2,464	6,440	3,580	3,520	4,900	7,820
Missouri	2,300	2,330	2,070	1,940	1,970	1,430	1,930	2,480	200,100	239,990	109,710	213,400	204,880	72,930	154,400	272,800
Montana	10	10	8	10	14	13	15	13	720	770	592	850	1,400	1,365	1,380	1,045
Nebraska	6,750	7,150	7,100	6,900	6,940	4,850	6,950	7,430	762,750	822,250	603,500	802,700	570,340	465,600	806,200	953,600
New Jersey	103	95	118	125	112	90	109	114	9,171	8,550	8,850	12,475	11,424	6,120	11,663	12,540
New Mexico	72	74	85	75	90	60	63	65	7,632	8,066	7,225	9,000	9,900	7,080	9,450	10,075
New York	600	630	700	800	730	600	670	720	51,600	59,800	67,890	74,400	67,160	54,000	60,970	68,400
North Carolina	1,600	1,690	1,730	1,830	1,630	1,280	1,620	1,625	121,600	128,440	103,800	140,910	164,630	76,800	143,808	128,375
North Dakota	300	315	290	315	320	435	630	560	23,700	23,788	16,820	41,553	35,160	29,145	41,580	40,320
Ohio	3,610	3,630	3,900	3,750	3,660	2,800	3,900	4,010	379,050	417,450	440,700	360,000	475,020	224,000	460,200	511,810
Oklahoma	65	75	75	55	60	37	50	58	4,225	8,250	3,250	3,850	6,000	4,144	3,250	6,148
Oregon	55	52	55	22	54	53	42	40	3,326	1,260	1,430	2,750	4,760	3,346	6,678	6,600
Pennsylvania	1,220	1,280	1,280	1,400	1,300	1,050	1,330	1,380	115,900	121,600	96,000	134,400	126,100	72,450	148,500	151,800
South Carolina	330	309	315	370	340	275	447	320	11,550	40,720	24,720	33,000	30,600	17,050	34,866	45,760
South Dakota	2,650	2,850	3,000	2,580	2,640	1,970	2,780	3,080	177,550	210,900	121,900	180,600	192,720	104,410	186,260	252,000
Tennessee	660	620	640	640	650	480	690	810	45,540	52,700	29,440	55,040	63,700	23,040	65,550	79,380
Texas	1,440	1,260	1,300	1,090	1,340	1,080	1,550	1,490	144,000	142,300	117,000	127,540	119,700	104,760	144,150	156,450
Utah	16	16	14	13	17	14	16	16	1,440	1,504	1,500	1,650	2,006	1,540	1,888	1,840
Virginia	630	615	595	625	595	440	540	550	32,290	33,045	32,725	36,250	62,475	16,320	36,160	54,450
Washington	65	97	88	103	190	110	150	135	7,410	11,931	11,088	12,875	27,550	17,600	23,250	21,600
West Virginia	58	59	58	68	69	60	81	73	4,466	5,251	5,162	6,256	6,900	4,680	8,100	7,663
Wisconsin	3,000	3,080	3,350	3,600	3,350	2,300	3,250	3,350	294,000	317,240	148,400	178,000	161,800	223,200	334,500	358,450
Wyoming	34	29	37	46	49	68	60	53	2,754	2,523	1,589	5,060	5,145	7,072	6,180	5,194
Total	71,930	72,400	73,040	74,624	71,352	51,445	71,915	78,154	7,267,927	7,918,819	6,644,841	8,203,953	8,197,334	4,166,708	7,674,020	8,865,086

E—Estimated
SOURCE: U.S. Department of Agriculture: Annual Crop Crop Summary, 1980-1986

TABLE 56
Soft Drink Value of Shipments and Shipments Deflator
(Millions of dollars except for deflator)

	Industry		Product		
	Value of Shipments (Current $'s)	Value of Shipments (1982 $'s)	Value of Shipments (Current $'s)	Value of Shipments (1982 $'s)	Shipments Deflator
1986[2]	N/A	$18,514	N/A	$17,157	N/A
1985[1]	19,786	17,939	18,115	16,423	110.3
1984[1]	18,440	17,347	16,696	15,706	106.3
1983	17,380	16,944	15,574	15,183	102.6
1982	16,808	16,808	14,892	14,892	100.0
1981	15,286	15,989	13,341	13,954	95.6
1980	13,909	17,007	11,995	14,667	81.8
1979	12,544	17,626	10,744	15,096	71.2
1978	11,417	17,221	9,683	14,605	66.3
1977	10,007	16,125	8,504	13,702	62.1
1976	8,780	14,969	7,562	12,893	58.7
1975	8,602	14,755	7,452	12,783	58.3
1974	6,713	14,317	5,901	12,585	46.9
1973	5,671	14,420	4,961	12,615	39.3
1972	5,454	13,771	4,807	12,138	39.6

[1]Estimated
[2]Forecast
NOTE: N/A = Not Available
SOURCE: U.S. Department of Commerce, International Trade Administration, U.S. Industrial Outlook, 1986

TABLE 57
Value of Shipments—Beverages, 1970-1985
Beverage Trends and Projections
(Millions of dollars except as noted)
1970-1985

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984[1]	1985[1]
Value of Shipments, Total	$10,802	$11,782	$12,203	$13,092	$14,990	$17,444	$18,132	$20,319	$23,199	$25,847	$26,849	$31,478	$33,886	$35,947	$38,154	$38,173
Wines and Brandy[2]	591	747	865	990	1,366	1,197	1,213	1,363	1,559	1,954	2,189	2,408	2,783	2,875	2,941	3,000
Distilled Liquor[2]	1,758	1,848	1,798	1,817	1,864	2,004	2,115	2,296	2,684	2,996	3,389	3,605	3,072	3,081	3,161	3,268
Malt Liquor[2]	3,822	4,140	4,054	4,368	5,047	5,641	6,024	6,653	7,539	8,353	9,362	10,179	11,195	11,775	12,305	12,119
Bottled and Canned Soft Drinks[2]	4,631	5,047	5,486	5,917	6,713	8,602	8,780	10,007	11,417	12,544	13,909	15,286	16,836	18,216	19,747	19,786

[1]Estimated
[2]Value of all products and services sold by each industry
SOURCE: U.S. Department of Commerce, International Trade Administration, U.S. Industrial Outlook 1978, 1981, 1983 and 1985

TABLE 58
Bottled and Canned Soft Drinks: Trends and Projections
(Millions of dollars except as noted)
1974-1985

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984[1]	1985[1]
Industry:[2]												
Value of Shipments	$6,713	$8,602	$8,780	$10,007	$11,417	$12,544	$13,909	$15,286	$16,836	$17,380	$19,747	$19,786
Total Employment (thousands)	114	117	122	114	115	119	118	117.3	113.6	112.0	112.4	112.0
Production Workers (thousands)	41	43	45	43	44	45	44	42.6	42.4	41.5	41.9	41.5
Value of Imports	$2	$4	$4	$7	$25	$58	$31	$38	$48	$47.1	$56	$105
Value of Exports	$10	$7	$11	$49	$77	$88	$84	$40	$41	$34.2	$29	$23

[1]Estimated by Bureau of Industrial Economics, Department of Commerce
[2]Includes value of all products and services sold by the bottled and canned soft drink industry (SIC Code 2086) Data may differ slightly from NSDA Sales Survey
SOURCE: U.S. Department of Commerce, International Trade Administration, U.S. Industrial Outlook 1978, 1981, 1982, 1983, 1985

TABLE 59
Soft Drink Industry Purchased Materials and Services
Major Input Categories 1967, 1977

Input Category	1967 Mil $	1977 Mil $	Input Category	1967 Mil $	1977 Mil $
Maintenance & Repair	13.6	77.6	Water Transportation	1.7	11.0
Condensed & Evaporated Milk	1.3	3.4	Communications	42.7	48.6
Fluid Milk	37.3	0.0	Electric Utilities	11.8	42.6
Canned Specialties	3.4	0.0	Water & Sanitary	1.6	6.5
Canned Fruits & Vegetables	67.4	71.4	Wholesale Trade	72.6	354.7
Frozen Fruits & Vegetables	11.5	0.0	Retail Trade	5.6	2.4
Sugar	177.5	492.1	Banking	9.9	50.4
Alcoholic Beverages	1.3	2.7	Brokerage Service	2.9	2.0
Flavorings & Extracts	407.5	868.1	Insurance Carriers	6.6	9.7
Shortening & Cooking Oils	5.0	0.0	Owner-Occupied Dwellings	79.8	52.0
Apparel	1.2	0.5	Personal & Repair Services	2.9	25.7
Wooden Containers	12.6	0.0	Misc. Business Services	43.3	70.0
Paperboard Boxes	84.9	143.3	Advertising	147.0	222.1
Commercial Printing	4.8	22.1	Misc. Professional Services	24.6	28.6
Inorganic Chemicals	20.2	31.9	Auto Repair & Services	16.4	9.2
Petroleum Products	14.1	19.6	Nonprofit Organizations	6.5	1.7
Tires and Tubes	2.3	1.0	Post Office	5.6	19.1
Miscellaneous Plastic Products	10.1	51.8	Business Travel	8.0	0.0
Glass Containers	242.4	828.1	Office Supplies	5.6	0.0
Metal Cans	155.4	1,577.9			
Metal Stampings	57.6	0.0	Sub-total	1,890.3	5,288.7
Special Dies & Tools	1.6	3.2	Other Inputs	19.2	531.9
Food Products Machinery	2.6	10.0	Total	1,909.5	5,820.6
Ball & Roller Bearings	3.3	3.8			
Rail Services	17.0	41.3	Value Added	1,243.8	2,776.2
Motor Freight	39.3	82.6	Total Production-Industry	3,153.3	8,596.8

SOURCE: U.S. Department of Commerce, Office of Business Economics, Input-Output Structure of the U.S. Economy: 1967 and 1977

Section XI

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Progressive Grocer
1351 Washington Boulevard
Stamford, CT 06902

Robert T. Shircliff and Associates, Inc.
2529 Gulf Life Tower
Jacksonville, FL 32207-9084

U.S. Government Publications
Copies of these publications may be obtained from:
The U.S. Government Printing Office
Superintendent of Documents
Washington, DC 20402

1) The Department of Agriculture:
Crop Production Annual Summary
Crop Production Report
Sugar and Sweetener Report

2) The Department of Commerce:
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4) The Department of Labor, Bureau of Labor Statistics:
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Producer Prices and Price Indexes
Productivity Measures for Selected Industries

Vending Times (magazine)
Vending Times, Inc.
545 Eighth Avenue
New York, NY 10018

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